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1 COMMON INFORMATION REGARDING PEOPLESOFT

1.1 WINDOWS, MENUS, PANELS

Within the PeopleSoft application, you will find several windows, to include:

- Develop Workforce
- Administer Workforce
- Compensate Employees
- Monitor Workplace
- Self Services
- Define Business Rules
- PeopleSoft

For this training, the Develop Workforce menu and panels are found within the Administer Training (U.S.) window.

Point and click on a PeopleSoft window, such as Develop Workforce, to display a drop down menu with the various modules available. Point and Click on a specific module to open that module. A menu bar appears across the top of the screen. The options on this bar include:

Go: The item used to view the various windows available to the user within the application.

File: Options available include Save, Run, Run with defaults, and Cancel.

Edit: As with most MS Window applications, the options of Cut, Copy, and Paste are present as icons on the toolbar within the application. Some of these options have "shortcut keys" associated with them as well. A "shortcut key" is 1-2 keystrokes to use rather than the mouse, where the user utilizes the "F1 - F12" and "Ctrl" keys on the keyboard. Refer to PeopleSoft toolbar guide.

Use: The available panels/panel groups within the selected module. These are the primary panels used for adding, deleting and correcting Employee-level data.

Setup: The option which, enables you to add, delete and/or correct table data for the selected module.

Process: Used to enable special "jobs" or process within the application.

Inquire: This item is used where summary panels are primarily found.

Report: Drop-down list of reports for the specified module, which would be run from the on-line system.

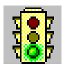
View: Provides users with navigational and display commands

Help: On-line high level help.

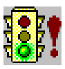
1.2 NAVIGATION THROUGH THE SYSTEM

PeopleSoft utilizes toolbar icons for ease in navigating through the system. Many of these functions may also be handled using short-cut keys. Where a short-cut key(s) exists as an option, the key(s) have been identified in parenthesis.

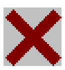
Save Sends the information you've entered on the panel to the database. You'll generally save when you come to the end of a panel group; the Save command always updates the data for all panels in a group. If there are any required fields on the panel that you haven't completed, the system will issue a warning or an error message. **(Enter)**



Run Runs a process, first prompting you to specify when and where you want it run.

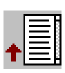


Run With Defaults Runs a process using the defaults set up in your process scheduler.

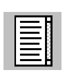


Cancel Clears the panel and any data that you may have entered or changed without saving. When you press Cancel, the system doesn't warn you to save changes. Use Cancel if you entered data incorrectly and want to start anew. **(Esc)**

Next In List Displays the data for the next data row in your search list box. This push button appears gray if you didn't select the data row from a list box, if there was only one row in the list, or if the data displayed is the last row on the list. **(F9)**



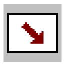
Previous in List Displays the data for the previous data row in your search List box. This push button appears gray if you didn't select the data row from a list box, if there was only one row in the list, or if the data displayed is the last row on the list. **(Shift+F9)**



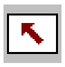
List Displays the list box generated by the search record for this panel, and allows you to select another row to update. If you accessed a row directly without going through a list box, this push button appears gray. **(Ctrl+F9)**

Next Panel in Group Brings up the next panel in the current panel group. If you have come to the end of the panel group, it brings up the first panel again. **(F2)**

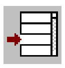
Previous Panel In Group Brings up the previous panel in the current panel group. If you're at the first panel of a group, it brings up the last panel. **(Shift+F2)**



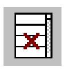
Next Panel (Group) Brings up the next panel in the menu. If you're in a panel group and have not reached the end, the command brings up the next panel in the group; if you're in the last or only panel in a group, it invokes the first panel of the next group. From the last panel in a menu, the Next Panel button summons the first panel. **(F6)**



Previous Panel (Group) Brings up the previous panel in the menu. If there is an earlier panel in the current group, it will be invoked; otherwise, the system will display the last panel in the previous panel group. From the first panel in a menu, the Previous Panel button summons the last panel. **(Shift+F6)**

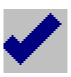


Insert Row Inserts a new row in a scrollable field. **(F7)**



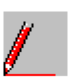
Delete Row Deletes the current row of data. **(F8)**

Add Inserts a new row of information to the database with a new high-level key.



Update/Display Accesses existing rows of data on the database. If data is Effective dated displays only current and future rows.

Update/Display All Accesses existing rows of data on the database and Displays all effective-date rows. Allows you to update only current and future rows.



Correction Accesses existing rows of data on the database and displays all Effective-date rows. Allows you to update all rows, including history rows.

1.3 ACTIONS - ADD, UPDATE / DISPLAY, UPDATE / DISPLAY ALL, CORRECTION

The four basic actions for PeopleSoft on-line are listed below. You will be allowed to use one or more of these functions based on the authorization associated with your User ID.

Action	Description
Add	**Inserts a new row of information to the Database with a new high-level key.**
Update / Display	**Retrieves existing current and future rows of data on the database. With this action, you can change future but not current rows of data.**
Update/Display All	**Retrieves all rows of data on the database to include current, future, and historical. However, you may only change future rows of data.**
Correction	**Overwrites any data in any existing row on the database. Must be used carefully because once new data is saved it cannot be retrieved again without restoring the data backed up from the day before.**

1.4 EFFECTIVE DATING AND SCROLL BARS

PeopleSoft uses Effective Dated logic to maintain an accurate history of information in the database. This logic is present throughout the system and can be found on the Job record for each Employee, as well as other records and all system tables in all modules. Effective dating enables users to update table-driven data with "as of " effective dates. Once the system-date (current date) matches the Effective Date, the information immediately becomes current.

When entering dates into the system, remember that MMDDYY will only work for dates on or before December 31, 1999 (12/31/99). For dates on or after January 1, 2000 (01/01/2000), you must enter MMDDCCYY. This is the only way the system will recognize and accept 21st century dates.

Effective Dated rows categorize information on Employee records, as follows:

Current: The data row with the most recent effective date, closest to today's (system) date, but not a future date. There cannot be more than one current row per Employee.

History: Data rows that have effective dates earlier than the current data row.

Future: Data rows that have effective dates later than the system date.

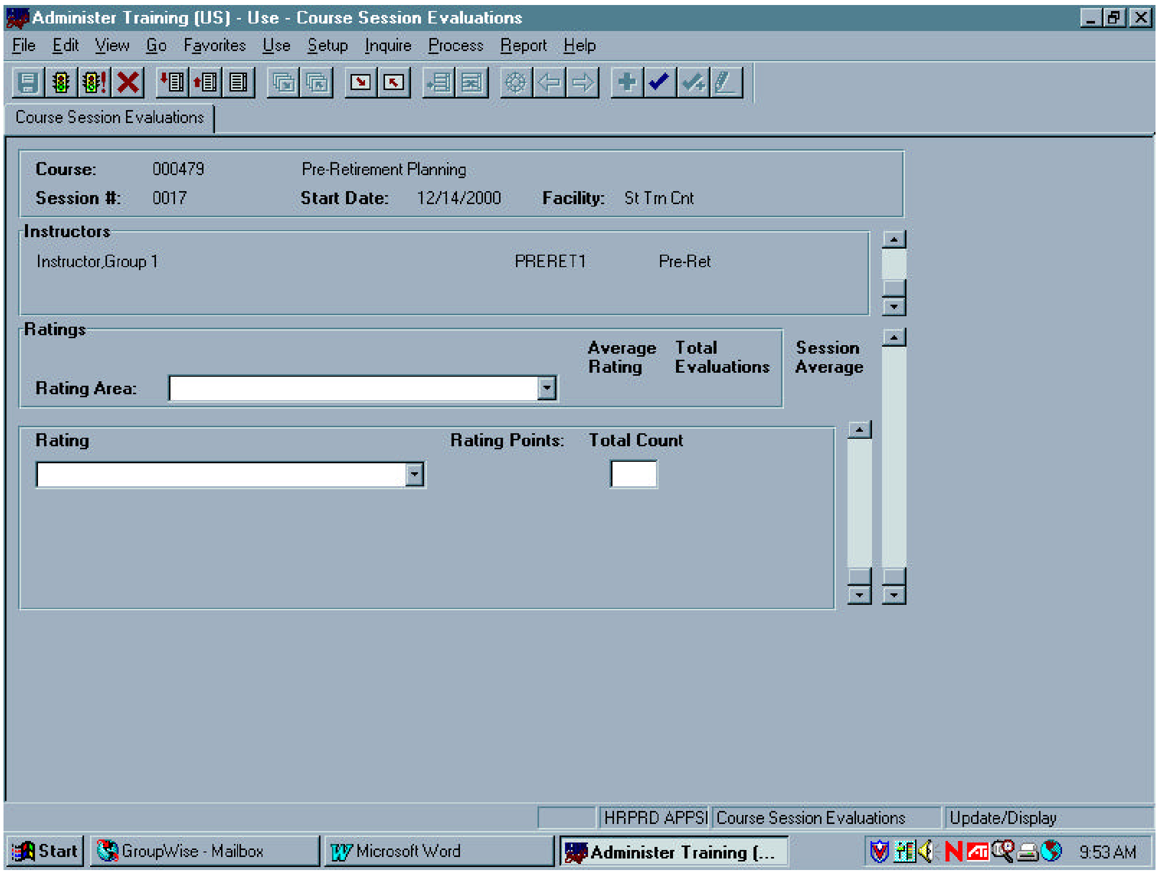
A category appears for all rows within the Job record on the Job Data 1 panel, next to the Effective Date for the record. The Current category will be the first row that appears for most employees, however, if a future row has been inserted into an employee's Job Record, that row will appear as the first row in the record. It is imperative to read the information on an employee record prior to making changes (adding, changing, and deleting data) to ensure that you are entering data on the proper row.

Action	Effective Date	Categorization of Row
Transfer	**09/15/99**	**Future**
Pay Rate Change	**11/19/98**	**Current**
Hire	**11/19/96**	**History**

The chart displayed above depicts an example of Job actions in relation to effective dates and their categorization on the database.

Scroll bars are navigational tools within panels, which are represented as narrow vertical rectangles with an arrow at each end, indicating multiple instances of a record. When a scroll bar is present on a panel, this indicates the panel is Effective Dated. Some panels may have more than one scroll bar present, as seen in the example below.

Based on the sample panel below, each scroll bar controls different levels of data on the record.



In order to determine what the "controlling" key of the scroll bar is; match the top of the scroll bar with the first field on the panel, which is parallel to the top of the scroll bar.

Below is an explanation of each scroll bar's function:

- The small outside scroll bar (top far right) controls the "Instructors" panel.
- The larger outside scroll bar (far right) controls the Ratings area. (Content, Instructor, Material, Facility, and Presentation)
- The inside scroll bar (right side) controls the Rating and the count. (Excellent, Good, Fair, and Poor)

NOTE: If the elevator box is at the bottom of the scroll bars, this indicates there are no additional rows of data within the record.

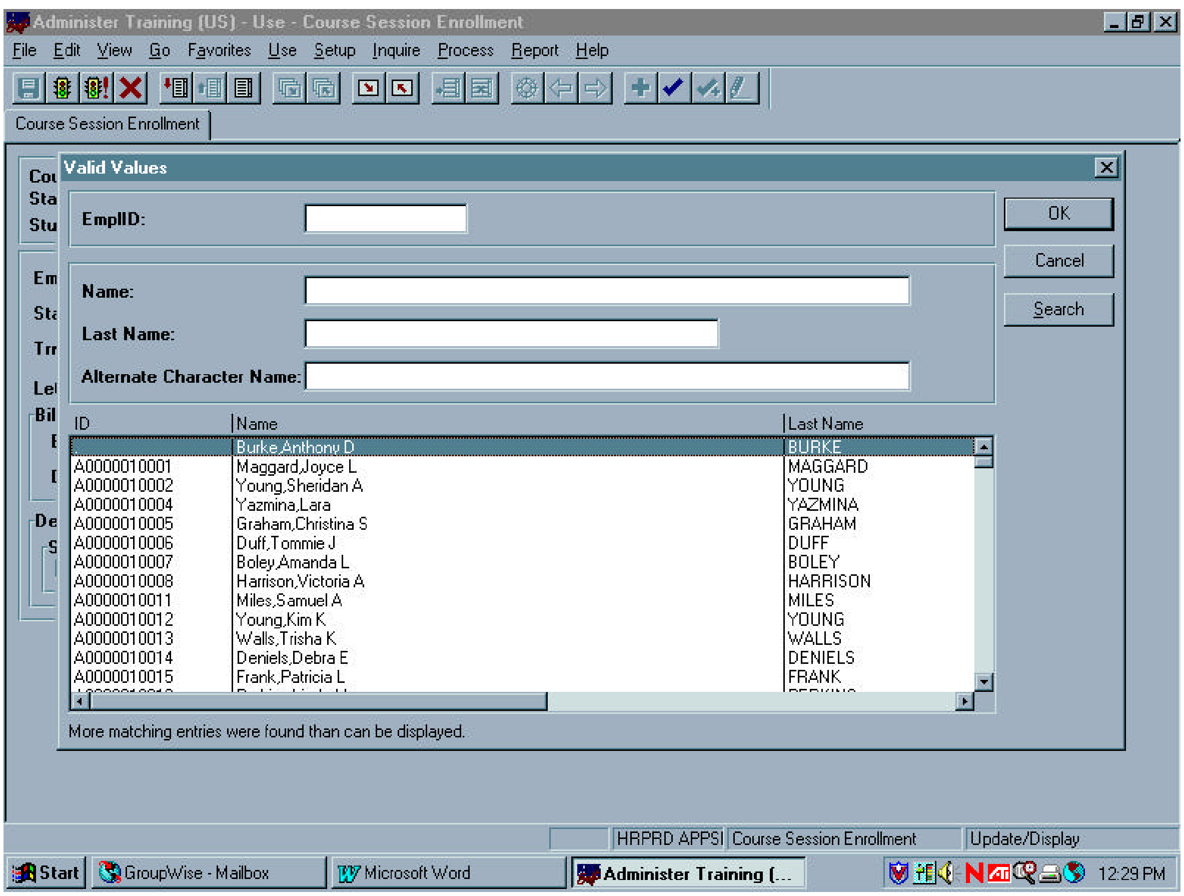
1.5 GLOSSARY OF TERMS

Current Date – See System Date.

Drop Down Box – A field on a panel that has a black triangle pointing downward immediately to the right of the field. This allows the input personnel to access and choose valid values for the field by clicking the triangle and choosing the correct value from either the list provided or by using the Search Record provided. For a drop down box attached to a PeopleSoft system table, a Search Record is generally provided.

Effective Date – A method of dating information in your system. You can predate information to add historical data to your, or postdate information in order to enter it before it actually goes into effect. The Effective Date usually defaults to the system (current) date.

Name Format – PeopleSoft requires a specific format when entering names into the system. The format is: LastName,FirstName MI. The first character of both the Last and the First names, as well as the Middle Initial are upper case. All other characters are generally, lower case. The system will allow combines as in McGuire or McDonald. There is always a comma



after the Last name and no space between the comma and the first character of the First name. Any deviation from this format will cause an error message and prohibit saving the current record until the format has been corrected.

NOTE: Typing the full Middle name is permissible.

NOTE: Type Jr (Junior, Sr (Senior), II (the Second), III (the Third), etc., After the Lastname EXAMPLES:

- Smith Jr,John R
- Smith III,John R

NOTE: Never use a period after Jr or Sr or after the Middle Initial.

National ID Number – Different countries track some form of National ID for payroll, identification, or benefits purposes. For example, Canadian workers have a Social Insurance Number, and US laborers have a Social Security Number. Each of these different types of National Ids has unique formatting requirements associated with them as well.

Phone – It is best to type the ten numbers in one string. The system will automatically format the field, inserting the slash and dash, when you tab out of it.system Date - **The date segment of the date and time from the P/C you are using.**

System Default Value – Many fields in PeopleSoft especially those attached to Translate Tables, have one set value that will automatically populate that field whenever you add a new record or add a new row to a present record. The system also gives you the option on some fields to set a preferred value as a default value. This can facilitate input processing when there is one value for a particular field that your company uses most often. By setting a default for the field you eliminate the need to input data into the field unless the needed value is different, or an exception to the default value.

Translate Table – A system edit table that stores codes and translate values for the miscellaneous fields on the database that do not warrant individual edit tables of their own. In most cases PeopleSoft maintains the Translate Table.

1.6 STANDARDIZED FORMATS FOR INPUT INTO THE PEOPLESOFT SYSTEM

General Rule

All typing into the system must be effected using proper Upper Case/Lower Case format(i.e. Kansas City – not KANSAS CITY). Do not type in all Capital Letters. The system will automatically format any field that requires information in all capital letters. (State abbreviations, Table Codes, etc.)

NOTE: EmplID – NEVER USE THE SOCIAL SECURITY NUMBER.

Let the system auto assign this number.

NOTE: ApplicantID – NEVER USA THE SOCIAL SECURITY NUMBER.

Initials and Prefix:

Do not enter any information into these fields, they are not being use. Middle initial will be included with the Name field as indicated above.

Address:

Address 1 – Type the Street address without using periods (i.e. St – not St.)

NOTE: PO Boxes can be type in the Address1 field if it is the ONLY address the Employee/Applicant has provided.

Address 2 - Type PO Boxes, Apartment Numbers, etc.

Address 3 – Type in-care-of (C/O) information.

City - Type complete name of the City using a Capital (uppercase) letter for the first character.

Special Exceptions:

- Fort will be Ft (No Period)
- Saint will be St (No Period)
- New, North, South, East and West will be spelled out.

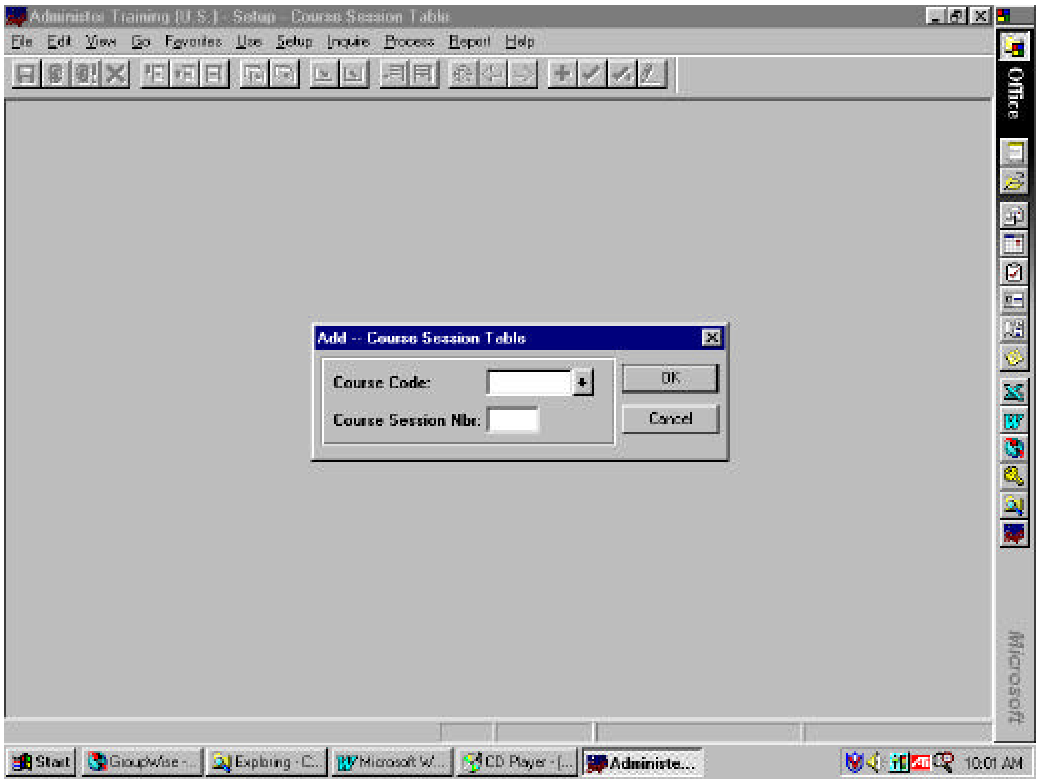
2 TRAINING ADMINISTRATION

2.1 ADD COURSE SESSIONS

STEP 1 – ADDING SESSION TO A COURSE

Navigate To Course Session Table Panel: GO – DEVELOP WORKFORCE – ADMINISTER TRAINING (U.S.) – SETUP – COURSE SESSION TABLE – COURSE SESSION PROFILE – ADD

The following Code Assignment Box will appear:

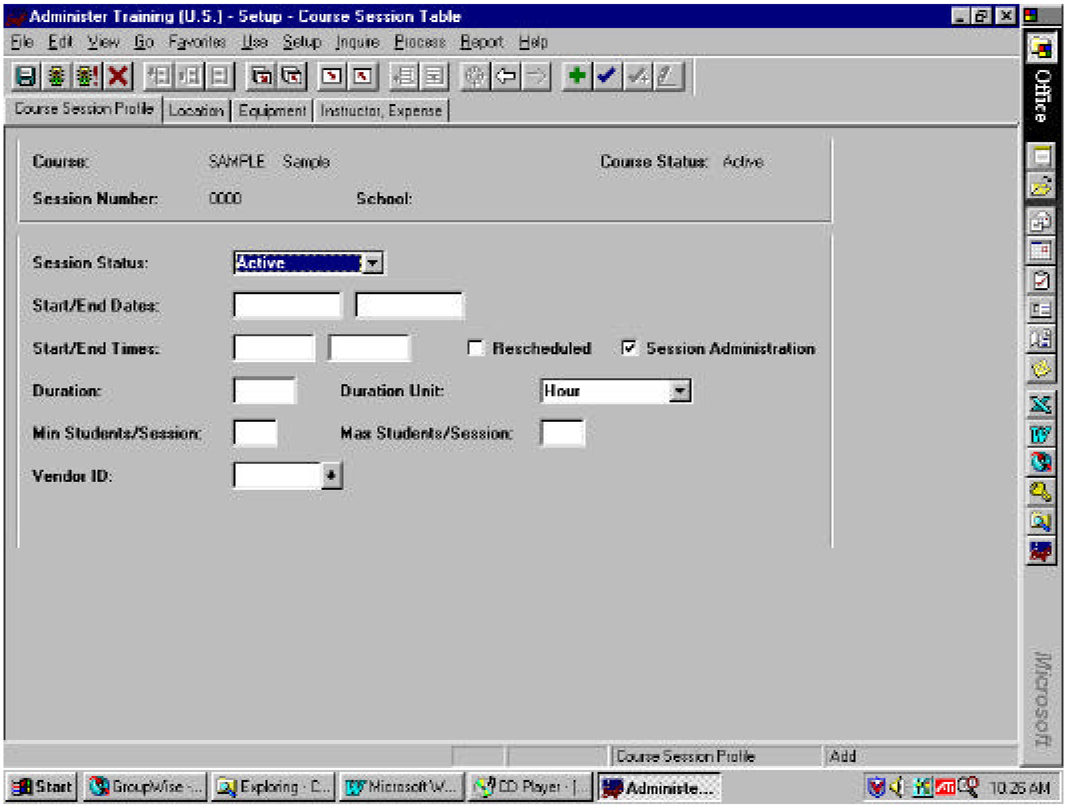


Course Code - Enter the Course Code for which the session is to be established. If unknown, click the drop down arrow to perform a search.

Course session Number – Do not enter a number in this field. The System will automatically assign the next sequential session Number for this Course on saving the record.

Click “OK” to proceed to the input screen.

STEP 2 – Course Session Profile Panel



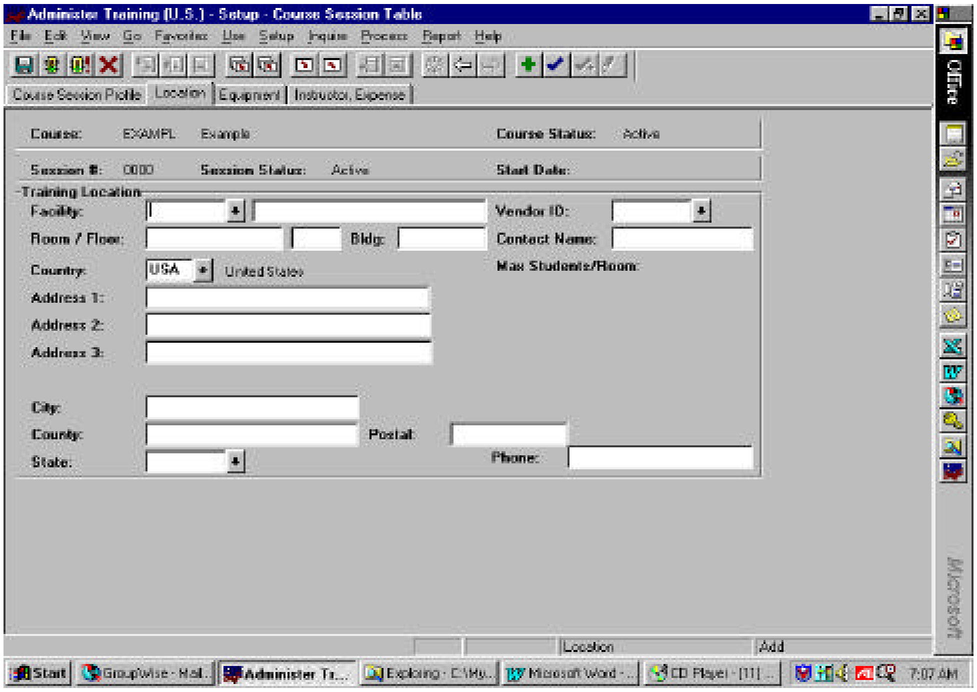
NOTE: The session number on the Panel display shows as "0000". The system will not assign the next sequential number until you save the record.

Enter the following fields:

- **Session Status: This field defaults to "Active**
- **Start/End Dates: MM/DD/YY**
- **Start/End Times: Military time (0900) – (1600).**
- **Session Admn: *MUST ALWAYS BE CHECKED (should default)**
- **Duration: Enter the number of hours/days**
- **Duration Unit: Click the drop down arrow and select the proper choice.**
- **Min/Max Students:This screen defaults from the Course Table (may be changed).**
- **Vendor ID: Select your Business Unit from the drop down arrow.**

Click the Location tab to proceed to the Location panel.

STEP 3 – Location Panel



Facility – Enter the Facility Code for the Location at which this session is held directly into the field, or click the down arrow to the right of the Facility field to search by Facility Name.

Entering a Facility Code and tabbing out of the field fills in the following fields automatically:

- **Facility Name**
- **Room/Floor**
- **Building**
- **Contact Name**
- **Country**
- **Max Students/Room**
- **Address 1, Address 2, Address 3**
- **City, County, Postal, and State.**

Once these fields have automatically filled, most of the fields will also be "grayed-out" and unavailable for change. The fields Room/Floor, Building, or Contact Name, are automatically filled, but remain un-grayed for editing.

To change a value in the Room, Floor, Building, or Contact Name fields, highlight the field to be changed and enter the new, correct information.

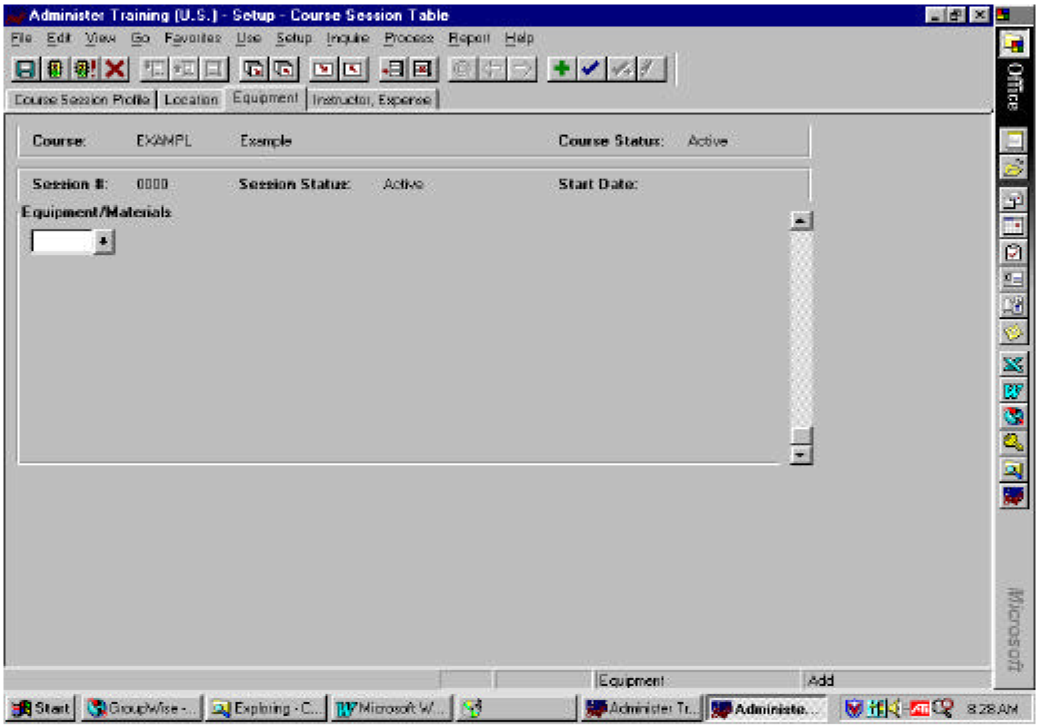
Phone – Enter the Phone Number for contact purposes at the Training Facility.

***Note –** The Vendor ID field should be left blank.

NOTE: When you save this record, the System will automatically compare the maximum number of students that were entered on the Course Session Profile Panel with the established Maximum for the chosen training facility. If discrepancies exist between the two numbers, the System will issue a warning message upon execution of the Save action.

Click the Equipment tab to proceed to the Equipment panel.

STEP 4 – Equipment Panel

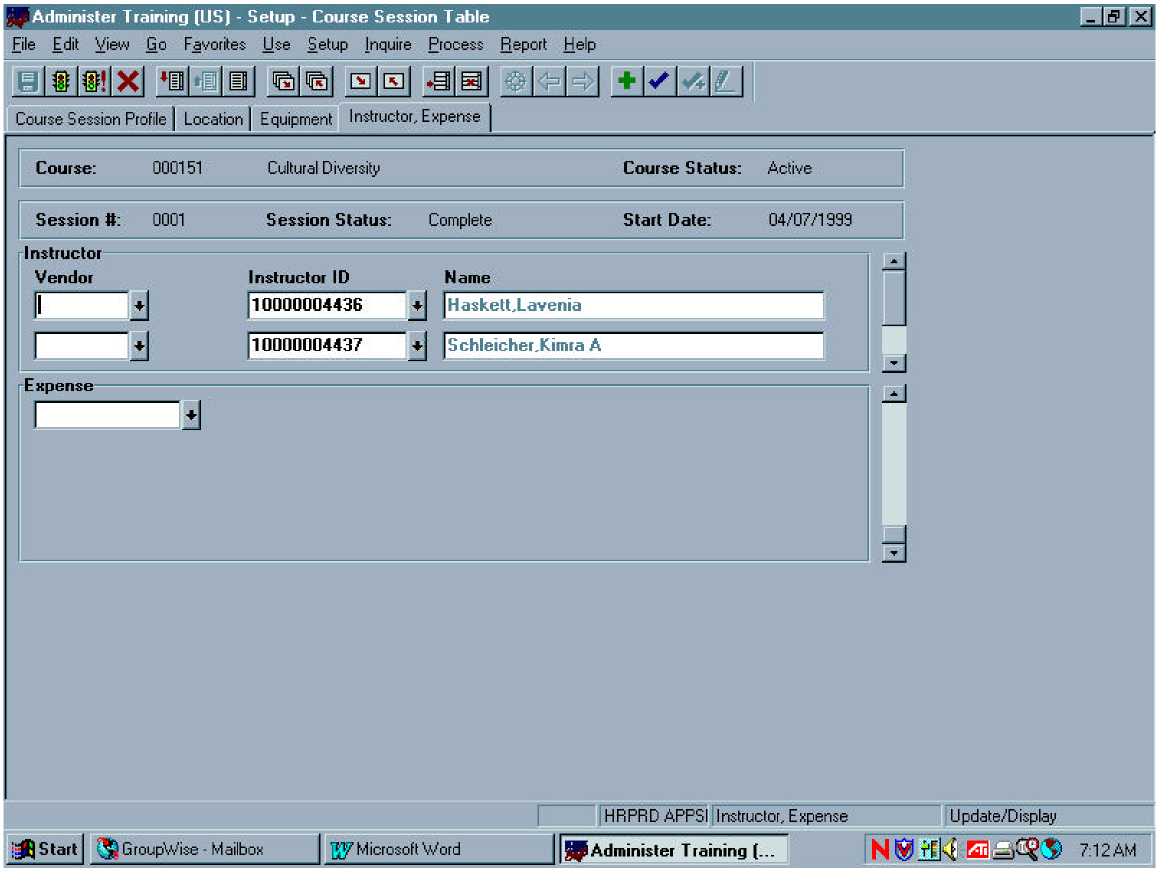


Equipment/Materials Code - Enter the Equipment/Materials Code in this field or click the down arrow to the right of the Equipment/Materials Code field. Click the correct value from the Search Record displayed.

If more than one piece of Equipment or Material is necessary for conducting the session, add an additional row for <u>each</u> item, by clicking the Insert a Row Icon and entering the next Equipment/Materials Code.

Click the Instructor Expense tab to proceed to the Instructor Expense panel.

STEP 5 – Instructor/Expense Panel



Vendor : Leave blank.

Instructor ID: Click the drop down arrow. The Search Box displayed will list the instructors authorized to teach this course. Select your Instructor. Once the ID is displayed in the field, tab out of that field and the name will appear in the name field.

> **NOTE: If your Instructor's name does <u>not</u> appear in the list box after clicking on the Instructor ID drop down arrow, leave this field blank and contact SPD, IMMEDIATELY.**

Expense: Leave Blank

STEP 6 – Save your record! NOTE: The system has now established a session number.

EXERCISE # 1

Using pages 13 -17 of the manual to assist you, Navigate to the "Course Session Table" and establish a session for two (2) courses with the same course titles. Make the Max students (10).

NOTE: Upon saving each new session, fill in the appropriate blanks below.

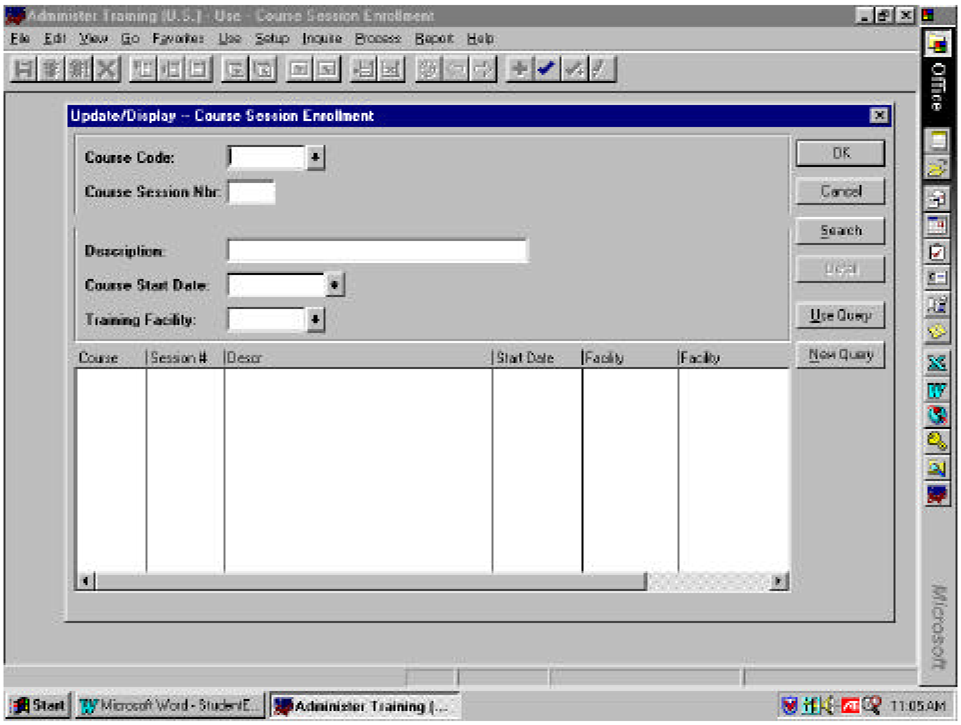
1 Course Code_________ Course Title__________________ Session #________

#2 Course Code_________ Course Title__________________ Session # _______

2.2 COURSE SESSION ENROLLMENT

Navigate To Course Session Enrollment Panel: – GO – DEVELOP WORKFORCE – ADMINISTER TRAINING (U.S.) – USE – COURSE SESSION ENROLLMENT

The following Search Box will appear:



Enter the Course Code and Course Session Number of the Course that you will be enrolling students.

If you do not remember the Course information, the following options are available to assist you in locating your session of choice:

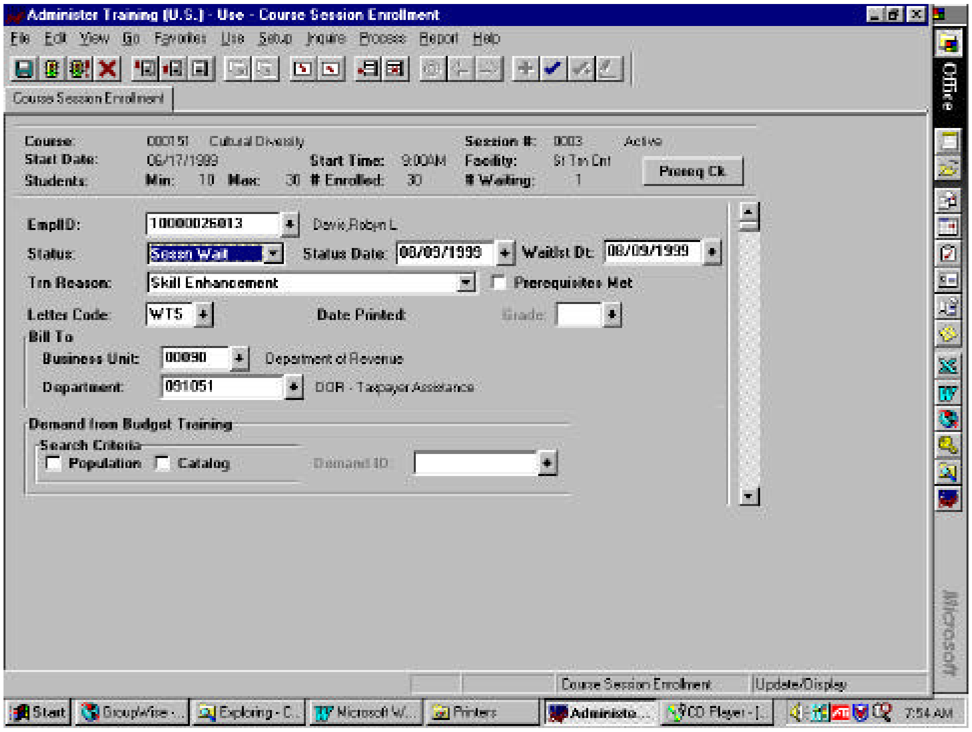
Option #1 – In the Description field, type the title of the course for which you are attempting to enroll students (or any version of it), click OK or Search, and a list of all the sessions for that and/or similarly titled courses will appear. Highlight your session and click OK.

Option #2 – Type the Description (Course Title) and Course Start date (mm/dd/yy), click OK.

Option #3 – Just click OK and a list of *all Course Sessions will appear. Scroll down until you locate the course in question, highlight it and click OK.

> ***Note –** Only the first 300 sessions will appear alphabetically in the Search Box, if your session doesn't appear, use Option #1.

Course Session Enrollment Panel



EmplID- Type the PeopleSoft EmplID Number for the Student enrolled.

If the EmplID for the Student is not known, Click the down arrow to the right of the EmplID box to produce a Search Record. Search for the appropriate EmplID using either the employee's full name or any part thereof.

Status – Type enrolled in this field or "click" the down arrow to the right of the field to Choose a translate value from the list displayed (the following items are **not** to be used: Attending, Canceled, Completed, Course wait).

The proper format for entering dates is MMDDCCYY. Refer to the section entitled "Entering System Dates" for further clarification on the proper method of entering dates into the system.

Training Reason - "Click" the down arrow to the right of the training reason field to select the appropriate value. **NOTE**: The training reason for all State Personnel classes will always be Skill Enhancement.

Prerequisites Met – Leave this field turned "Off". A prerequisite check can be run against all Students to verify if course requirements have been met.

Letter Code – The System automatically populates this field depending on what's entered in the Status field.

Grade – This field is grayed out and unavailable. No input is necessary to this field.

Bill to Business Unit – The System automatically populates this field with the Student's Business Unit when the Employee ID number is entered into the EmplID field. No change will be made to the Business Unit number populated by the System.

Bill To Department – The System automatically populates this field with the Student's Department number when the EmplID number is entered into the EmplID field. No change will be made to the Department number populated by the System.

Demand from Budget Training – This functionality is not being used. Therefore, no information will be entered into either the "Population", "Catalog" or "Demand ID" fields.

When all information has been entered for a Student, continue adding additional students to the session by clicking the insert a row icon and repeating the steps above or save the record and exit out of the panel.

> **NOTE: Refer to the section of this manual entitled "PeopleSoft Short-Cut Keys" for an explanation and depiction of the PeopleSoft Icons.**

Saving Course Session Enrollment Records

Click the "Save" Icon on the PeopleSoft title bar to save the record.

Checking Course Prerequisites

The System automatically checks all students to ensure any prerequisites have been met. To do this, click the "Prereq Ck" button in the upper right hand section of the Course session Enrollment panel. Students who have completed the prerequisites will have the "Prerequisites Met" field turned "On" (filled with a check ☑ mark). Scroll through all Student records listed for the Course session.

Change the student's Status field to show "Incomplete" if there are prerequisites for this Course, and a student's "Prerequisites Met" field is "Off" (unchecked) after running the Prerequisite check

> **NOTE:** If a prerequisite check is run on a Course for which there is no prerequisite courses established, the System will produce the following Message: **"No prerequisites are needed for this course (1040,46)"**

Click the "OK" box to continue working in PeopleSoft.

Saving the Entered Data

To save the updated student record, click the "Save" Icon on the PeopleSoft title bar.

EXERCISE # 2

Using pages 19 – 21 of the manual to assist you, navigate to the "Course Session Enrollment" panel and enroll 10 students in the 1st of the two (2) Sessions established in Exercise # 1.

Save your record.

Please list the Name and EmplID of two (2) students enrolled.

Name: ______________________________ EmplID: ___________________________

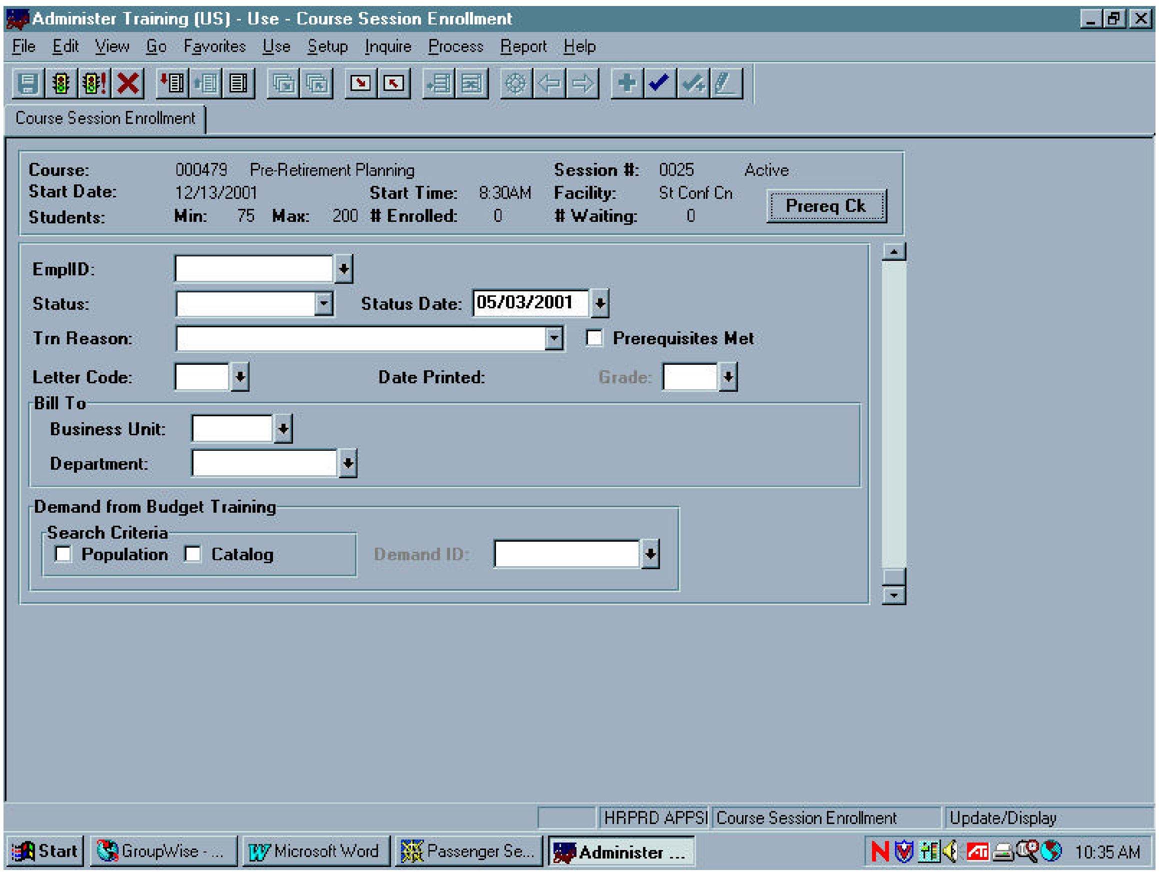
Name: ______________________________ EmplID: ___________________________

2.3 CHANGE STUDENTS STATUS IN COURSE SESSION

Procedure: Change the status of an individual student.

Follow the steps outlined below:

Navigate To Course Session Enrollment : GO – DEVELOP WORKFORCE – ADMINISTER TRAINING (U.S.) – USE – COURSE SESSION ENROLLMENT



Using the scroll bar to the right scroll through the list of students enrolled in the course until you find the individual whose status you wish to change.

Status – Click the down arrow to the right of the status field to choose a value from the list displayed. Change the student's status for a course session.

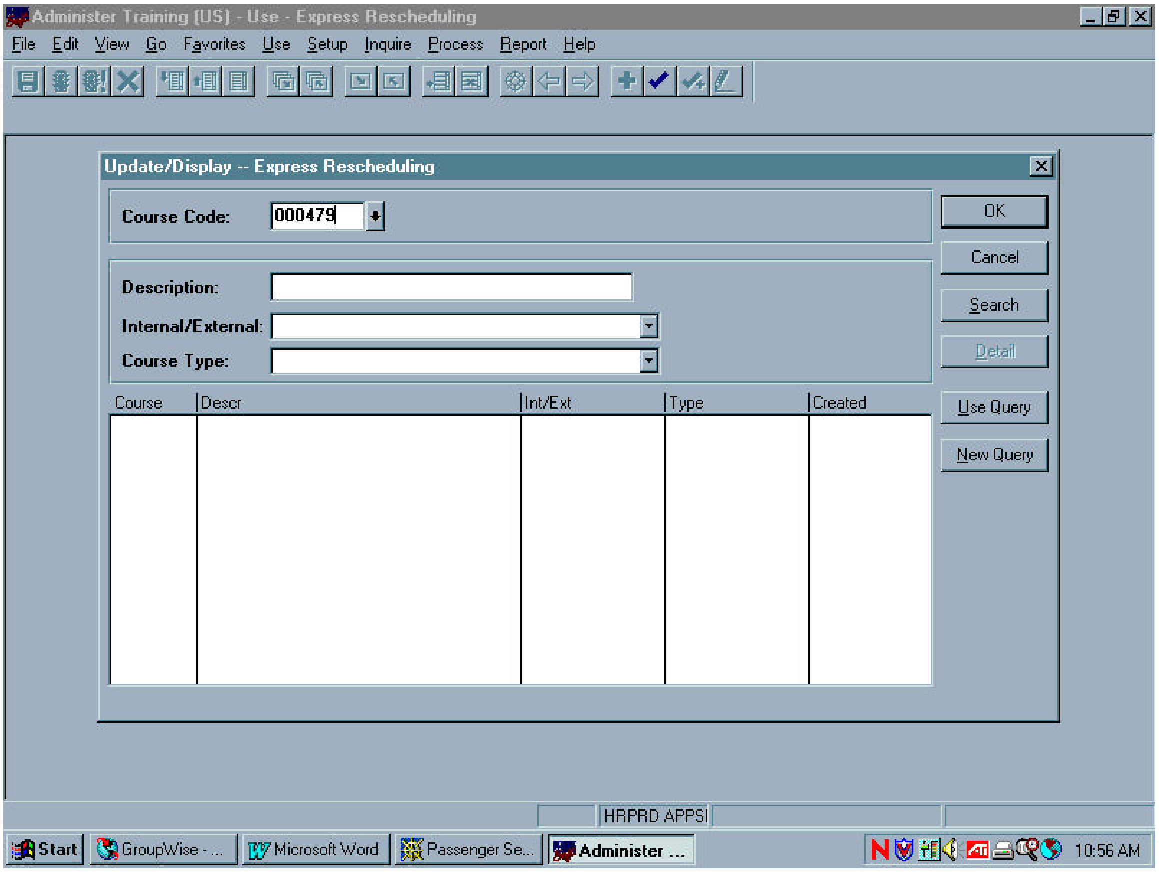
The only valid values for this situation would be "Dropped" or "Incomplete".

- Drop a student from a course session use the value of "Dropped".
- If a student requests to reschedule in a different course session, use instruction in either the "Course Session Enrollment" and/or "Express Rescheduling" sections.
- If a student does not complete the entire course, use the value "Incomplete".

Click the “Save” Icon to save the record.

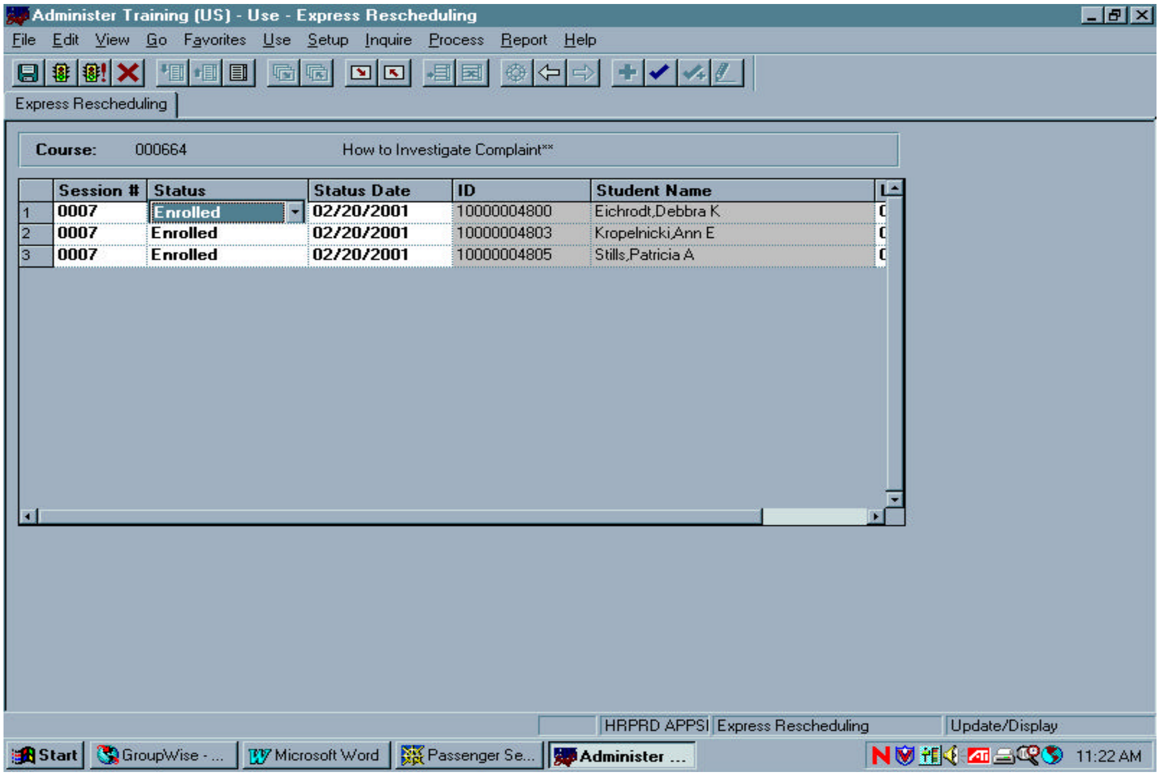
2.4 EXPRESS RESCHEDULING

Navigate To Express Rescheduling Panel: GO – DEVELOP WORKFORCE – ADMINISTER TRAINING(U.S.) – USE - EXPRESS RESCHEDULING

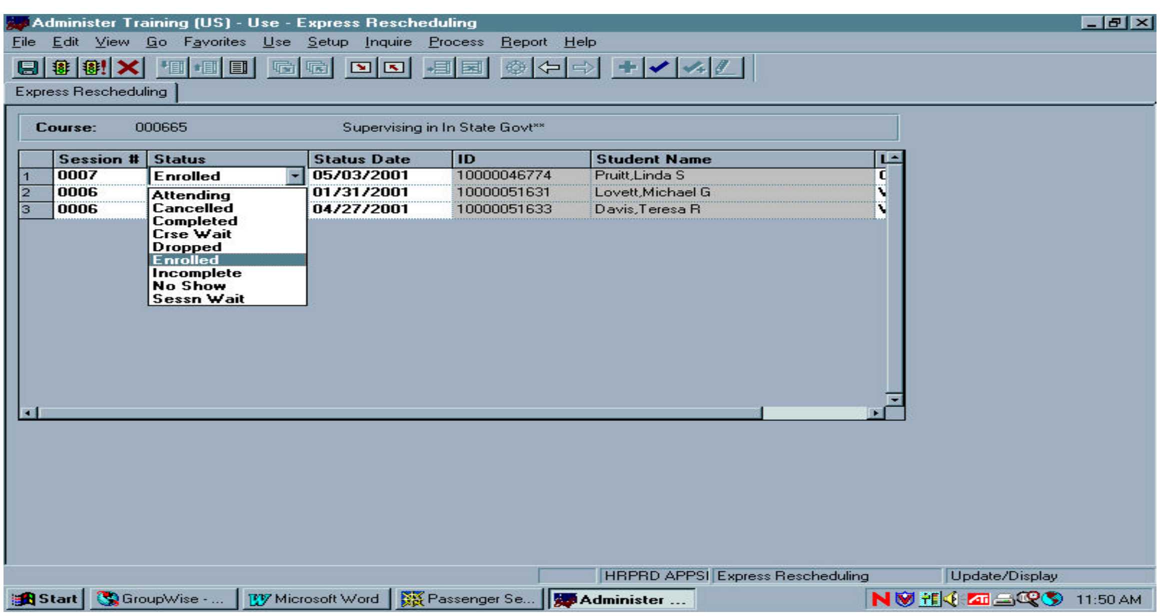


Express Rescheduling Search Box

- Enter the Course Code number
- Click Search
- Highlight the correct course
- Click “OK”



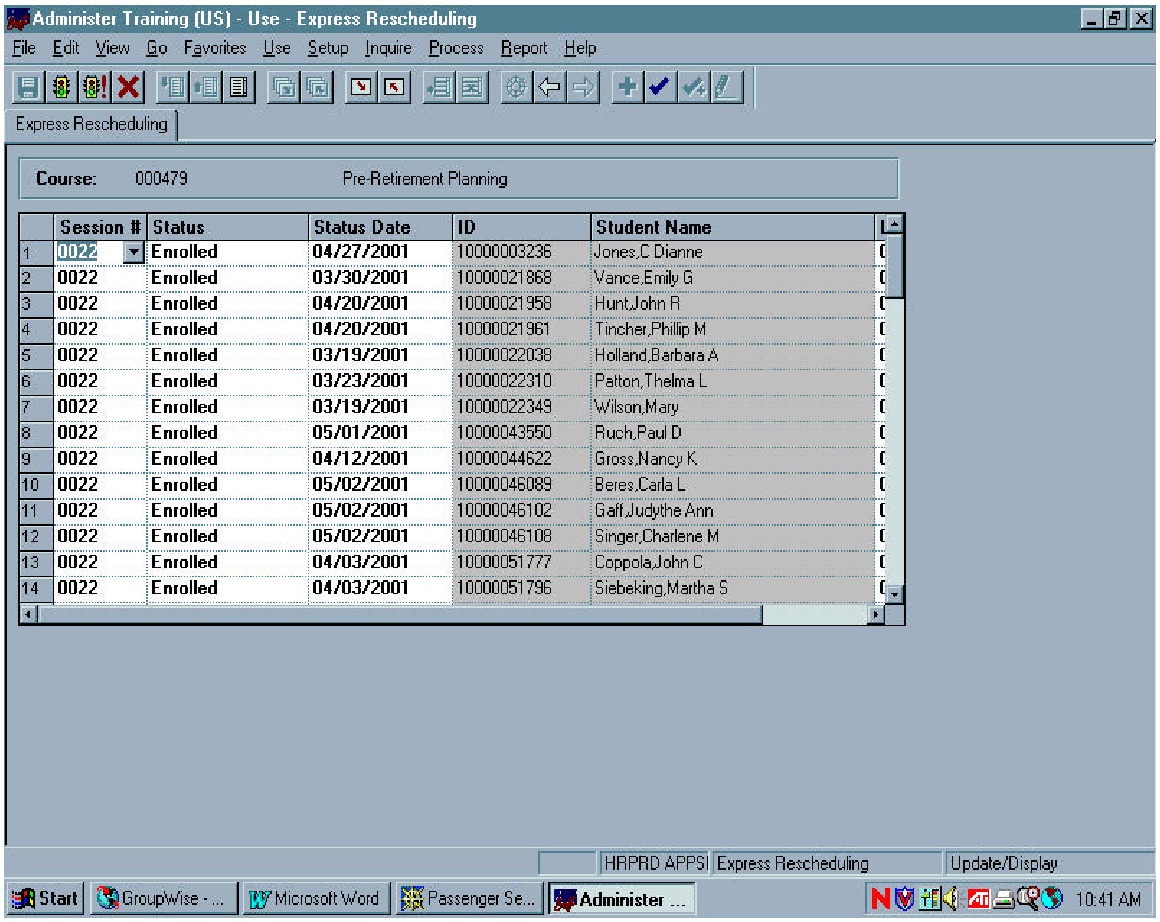
Use the Express Rescheduling Panel to review and update information for all students who are enrolled in active sessions of a particular course or are on a course or session waiting list. Students may move from one session to another, change their enrollment status, and designate the type of form letter they should receive. Choose the student field to be changed by placing the cursor in that field. A drop down arrow will appear to the right of the field presenting choices from a table of values. Click a value for the student.



Express Rescheduling

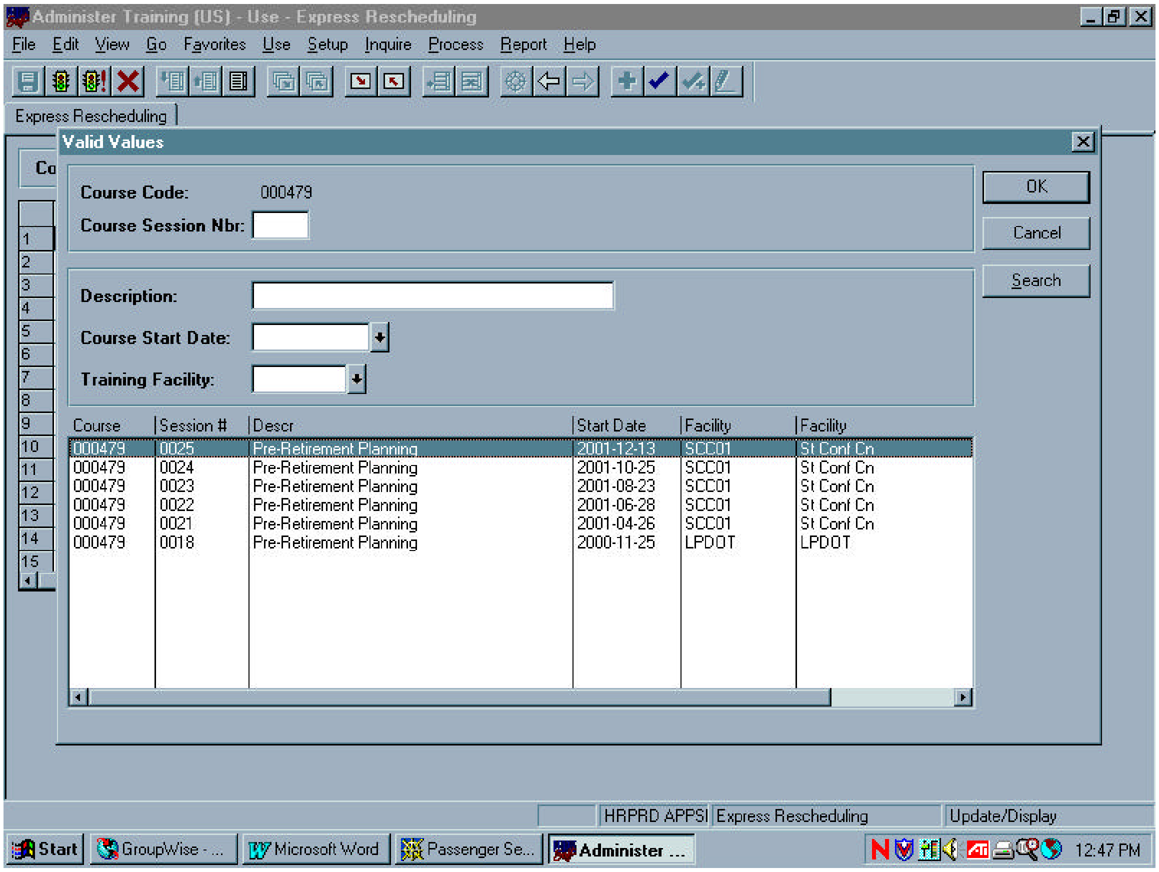
Procedure: Reschedule a student to a different course session schedule.

Follow the steps outlined below:



Session # - Click on the students session number record. A down arrow will appear to the right of the session number. Click the down arrow. A search panel will appear.
See panel shot below.

> **Note**: If there is not a course session in which to Reschedule the student into, you will need to add a new course session. Add a course session using the instructions in "Adding a Course Session" section of the PeopleSoft Training Manual.



Search Panel – Highlight the new course to reschedule the student. Click OK.
Click in the Status field for the student just rescheduled. A down arrow will appear to The right of the student's previous status.
Click the down arrow. A value will appear. From this value table, the student's status In the new course may be changed to either enrolled, or session wait.

Click the "Save" Icon to save the record.

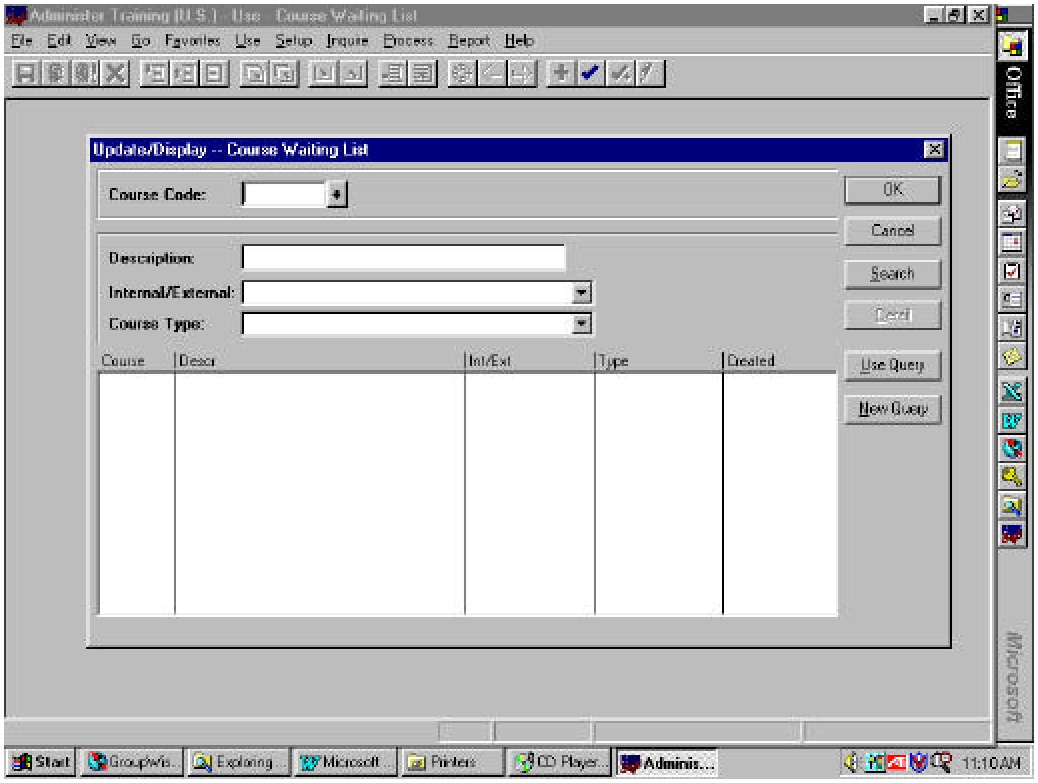
EXERCISE # 3

Using pages 24 – 27 of the manual to assist you, navigate to the "Express Rescheduling" panel. Reschedule 5 students enrolled in the 1st Session you established in Exercise #1. Do not save upon completion of this Exercise.

2.5 PLACE STUDENTS ON COURSE WAITING LIST

Navigate To Course Waiting List: – GO – DEVELOP WORKFORCE – ADMINISTER TRAINING (U.S.) – USE – COURSE WAITING LIST

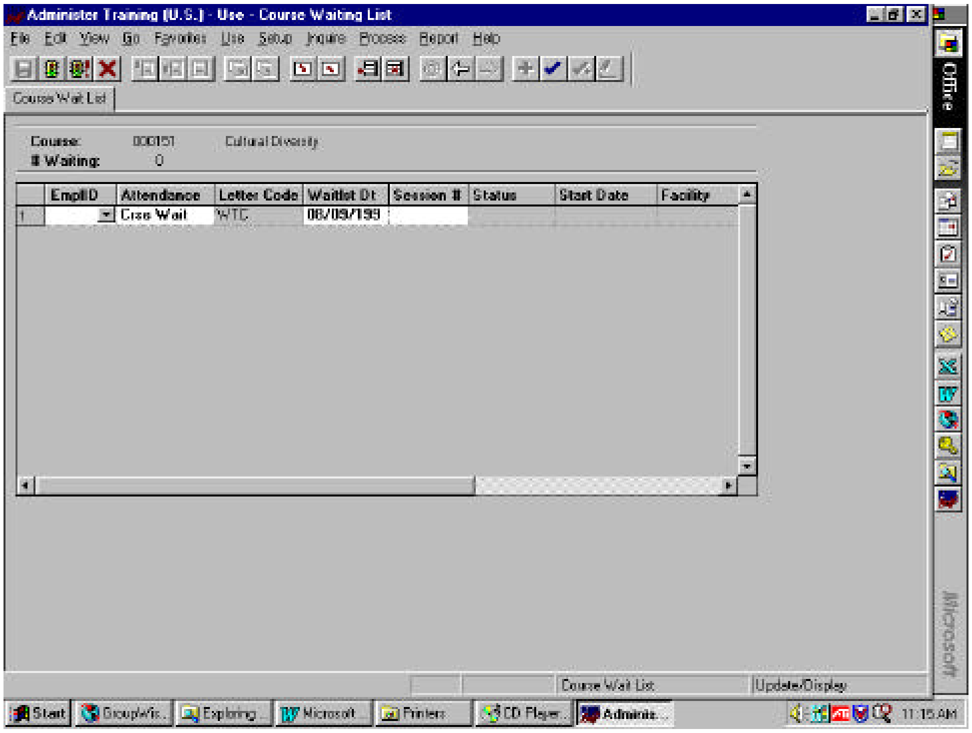
The following Search Box will appear:



Enter the Course Code of the Course Waitlist to be updated.

If the Course Code is unknown, click the "SEARCH" button to produce a list of Course titles in the Course table. Scroll down the list until you find the Course, or you can narrow your search options by clicking in the "Description" field and typing the Title of the Course or any variation of the title. (i.e. 1st three letters of the title, or just the 1st letter)

Course Wait List Panel



EmplID – Enter the PeopleSoft EmplID Number for the Student being placed on the Waitlist by clicking the drop down arrow in the EmplID field and utilizing the search box.

Attendance – Click in the Course Wait field, a drop down arrow will appear. Click the drop down arrow and select "Session Wait" from the values listed.

Waitlist Date – The current date will default, (Automatically Appear). Change this date to the "Received" date stamped on the Student's Registration Form.

Session – By clicking into the session number field, a drop down arrow will appear. Click the drop down arrow and select the appropriate session from the search box.

Adding Additional Students to the Course Wait List

Click the "Insert Row" Icon on the PeopleSoft tool bar to produce a new line on the list to insert a new record. Follow the procedure to complete the new line.

Saving Changed Course Wait List Record

Click on the save icon to save record**.**

EXERCISE # 4

Using Pages 28 - 30 of the manual to assist you, navigate to the “Course Waiting List” panel. Place 5 – 10 students on the waitlist for the 2nd session established in Exercise # 1.

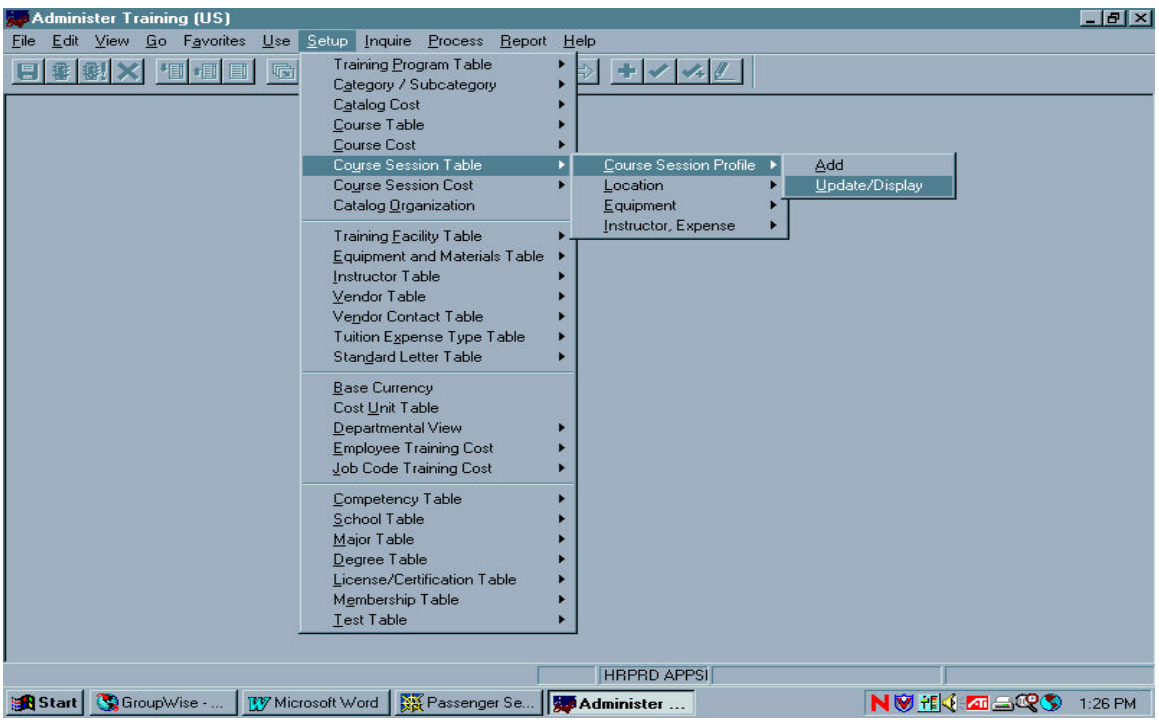
2.6 UPDATING COURSE SESSION

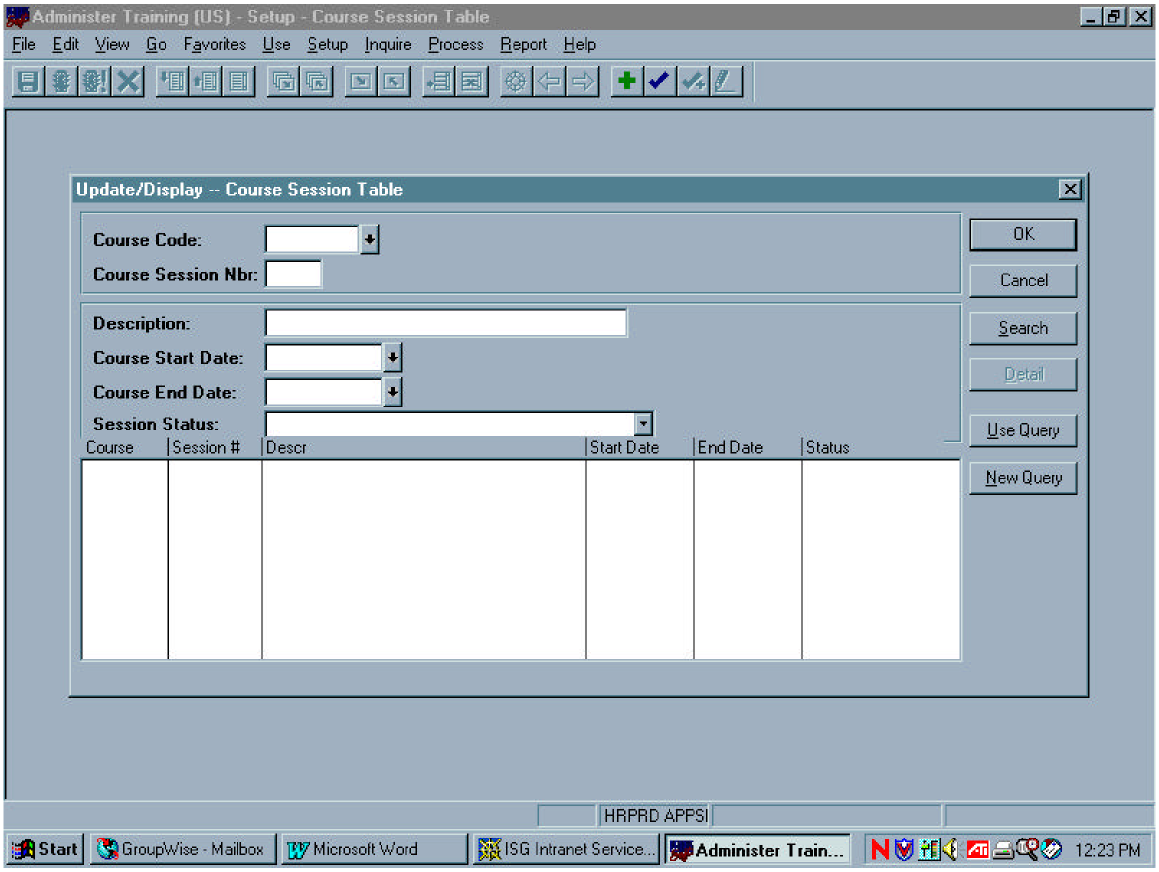
Procedure: Update a course session.

Follow the steps outlined below:

Navigate To Course Session Table: GO – DEVELOP WORKFORCE – ADMINISTER TRAINING (US) – SETUP – COURSE SESSION TABLE – COURSE SESSION PROFILE – UPDATE/DISPLAY

The search panel below will appear.

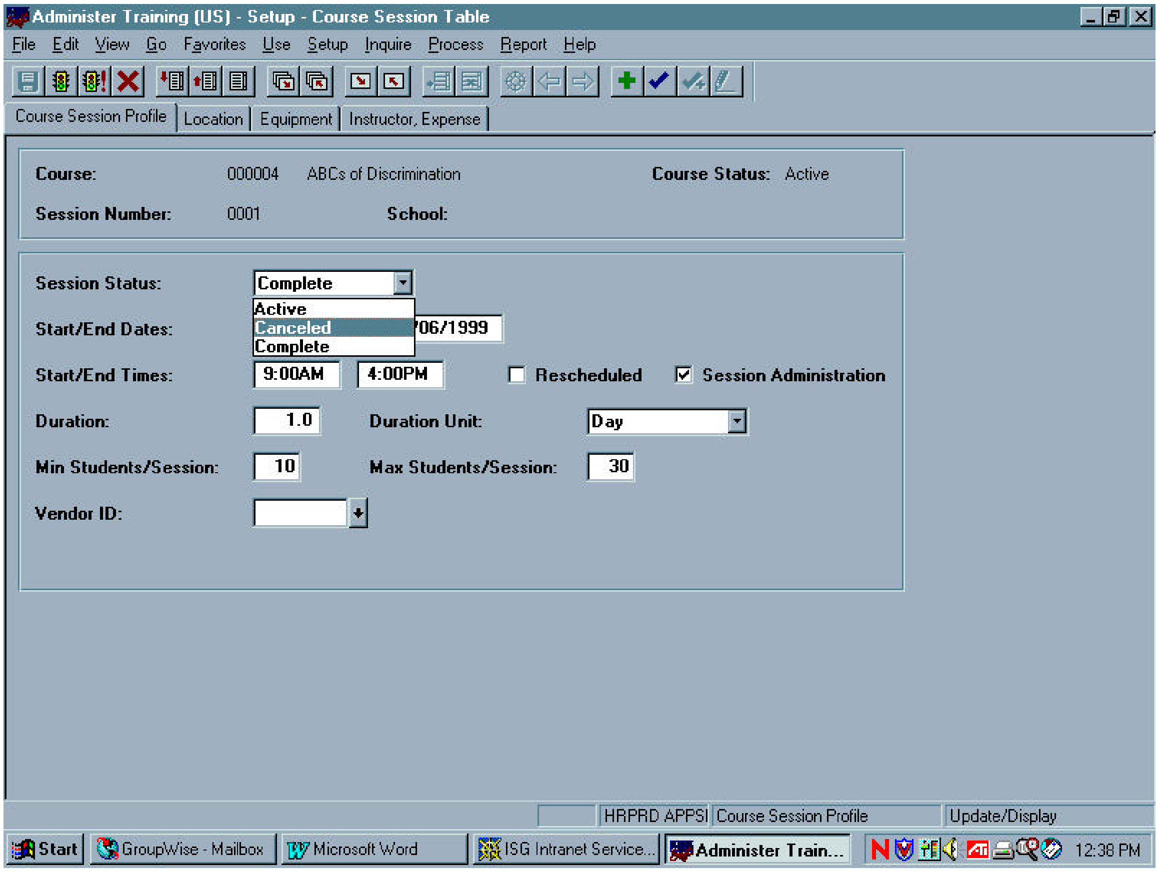




Enter the Course Code for the Course Session you wish to change.

If the Course Code is not known, click the "Search" button to produce a list of Course sessions. Scroll down the list until you find the Session, or you can narrow your search options by clicking in the "Description" field and typing the Title or any variation of the title. (i.e. 1st three letters of the title, or just the 1st letter).

Either highlight the desired course and click on it twice or highlight and click "OK".



Session Status – Drop down the arrow to the right of the session status field. Choose the appropriate value.

If the value "Canceled" is chosen, the status field on each student's record on the Course Session Enrollment panel will be updated to "Canceled".

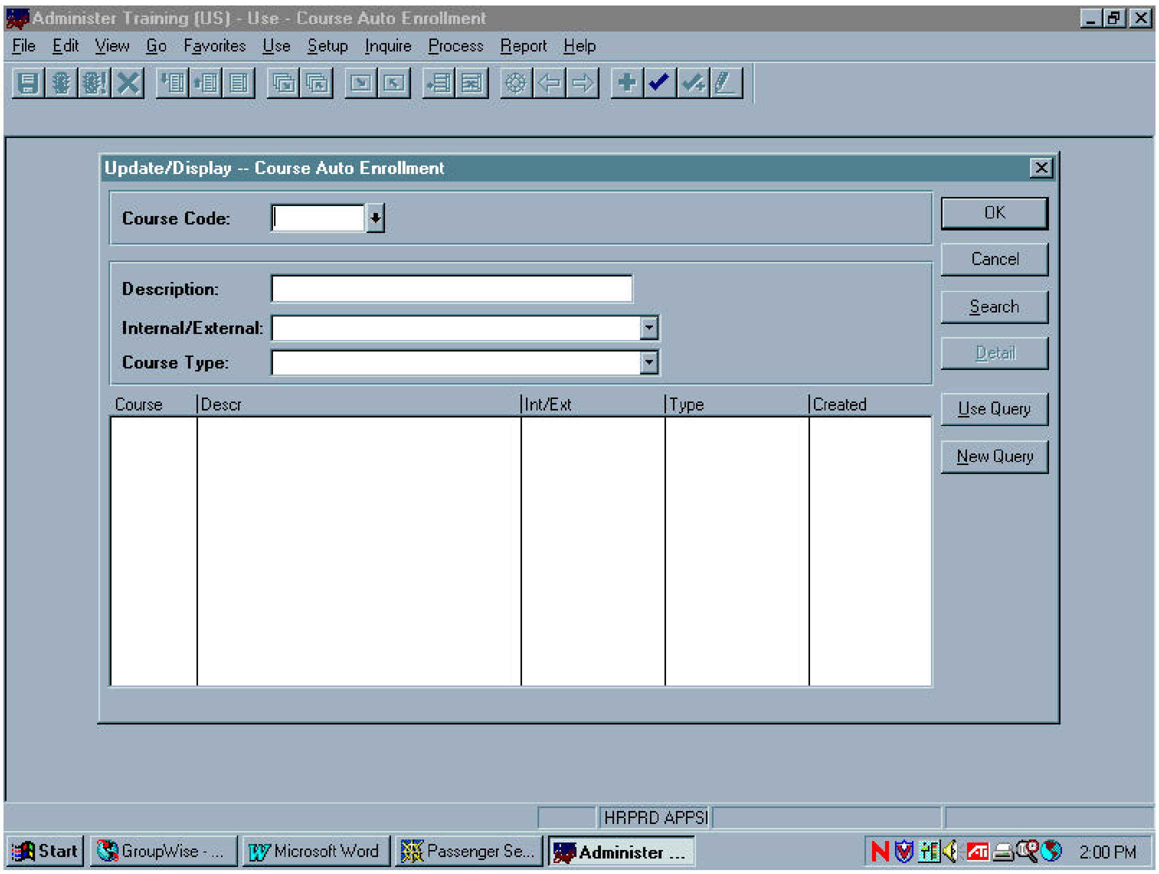
Use the instructions in the "Express Rescheduling" section to enroll the students in a different session.

Click the "Save" Icon to save the record.

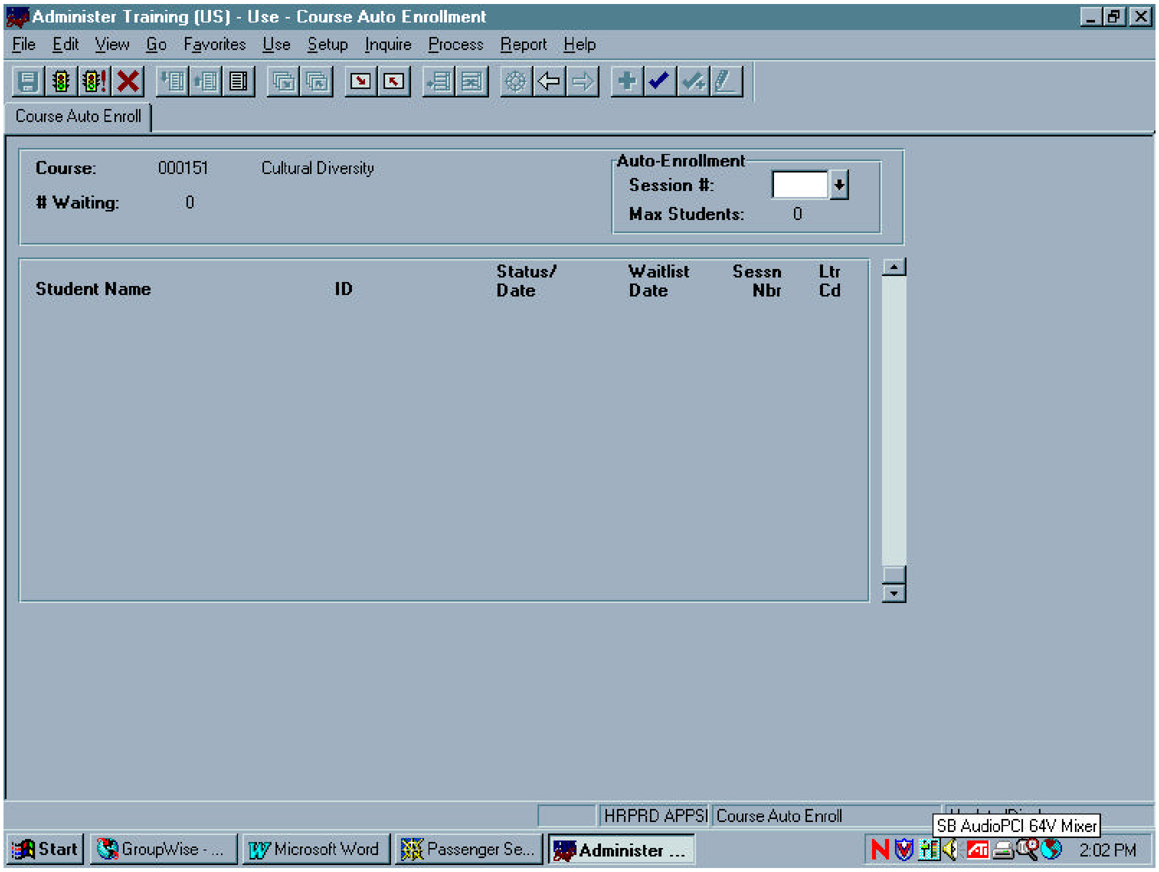
2.7 AUTO COURSE ENROLLMENT

Navigate To Auto Course Enrollment: GO – DEVELOP WORKFORCE –ADMINISTER TRAINING (U.S.) – USE – COURSE AUTO ENROLLMENT

The following Search Box will appear:



Enter the Course Code of the Course for which Auto Enrollment is to be processed.



Only one field exists on this Panel for entering data.

Session # - Enter the correct number that corresponds to the session for which you want to process Auto Enrollment , or click the down arrow to the right of the "session "field and click the correct value from the Search Records displayed.

Course Auto Enrollment and run periodically to update enrollment records and to continue filling class spaces as registrations arrive.

When a session's enrollment reaches capacity, Course Auto Enrollment will not allow any more students to enroll.

Saving Course Auto Enrollment

Save by clicking the save icon.

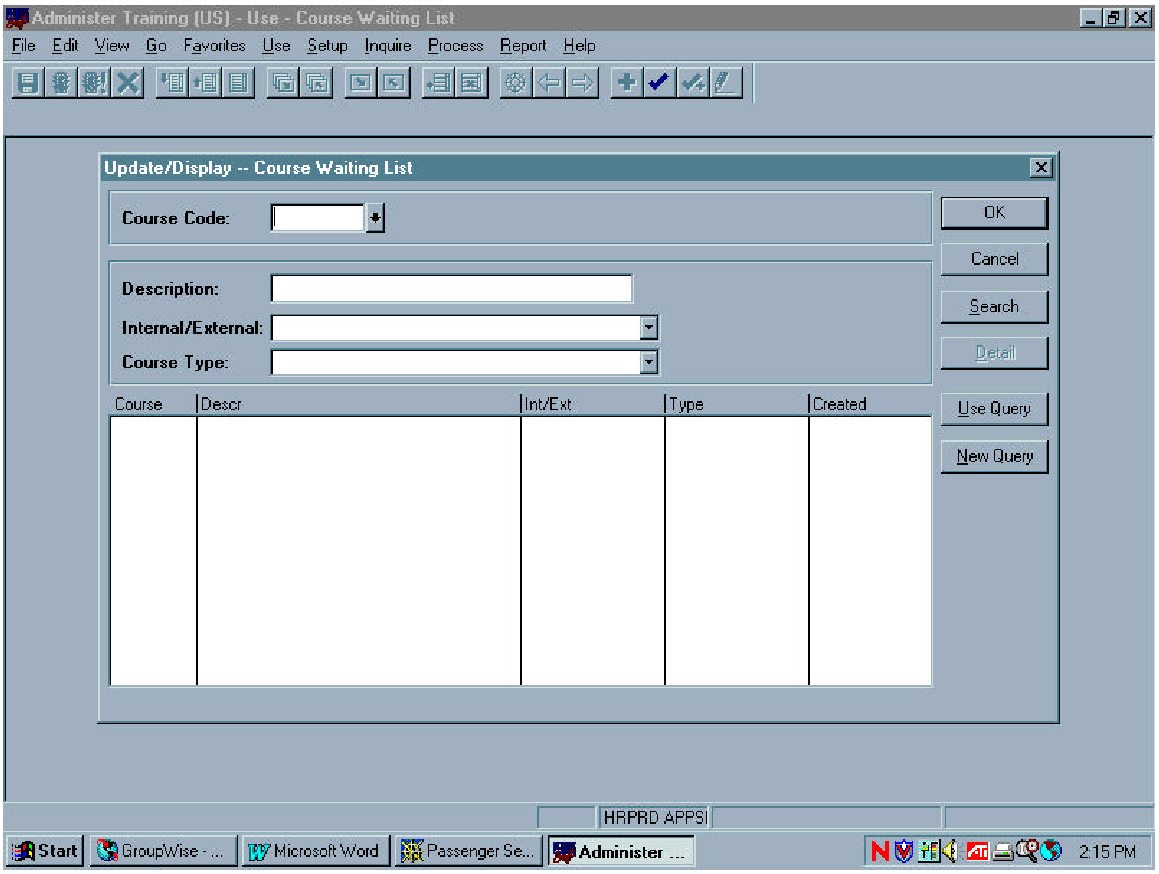
EXERCISE # 5

Using the manual to assist you, navigate to the "Course Auto Enrollment " panel. Run Auto Enrollment for the 2nd Course Session established in Exercise #1.

2.8 RE-ASSIGNING SESSIONS FOR UN-ENROLLED STUDENTS

Navigate To Course Waiting List: GO – DEVELOP WORKFORCE –ADMINISTER TRAINING (U.S.) – USE – COURSE WAITING LIST

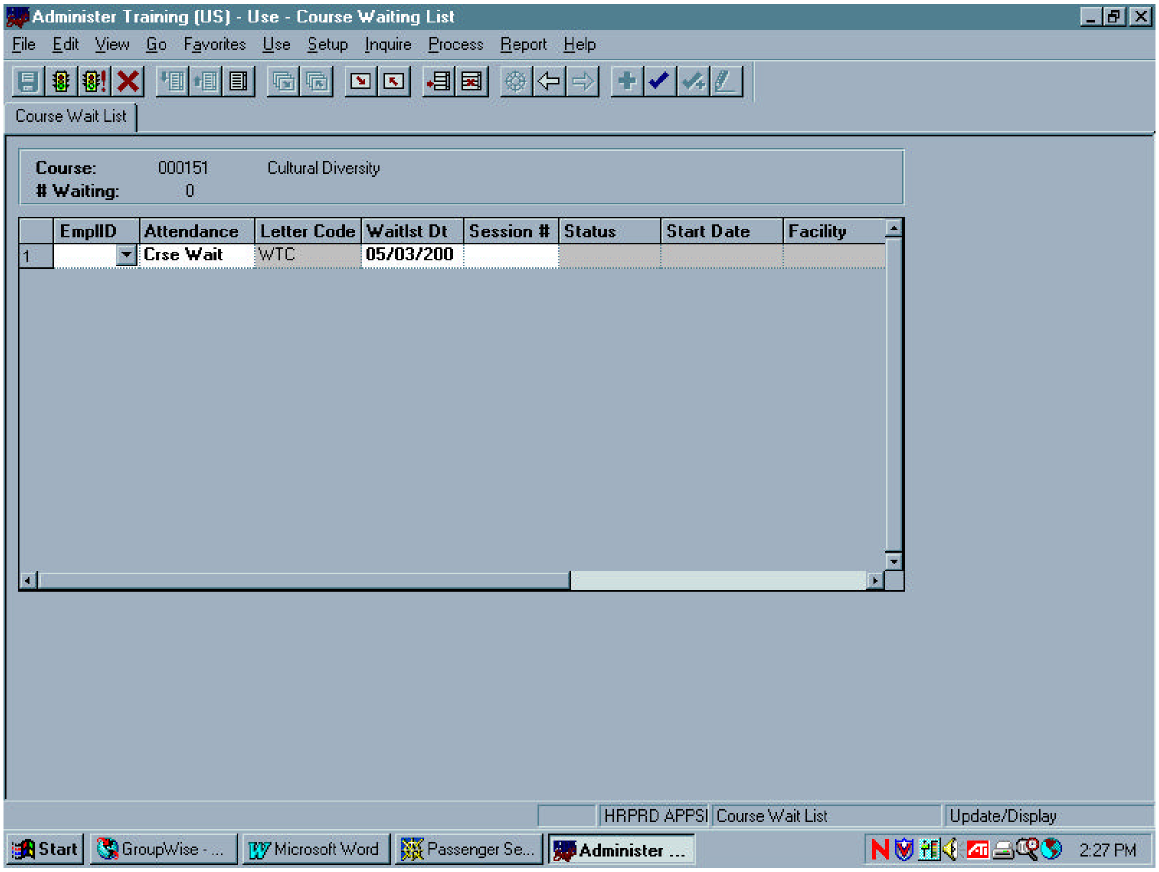
The following Search Box will appear:



Enter the Course Code of the Course Waitlist to be updated.

If the Course Code is unknown, click the Search button to produce a list of available options in the Course table.

Course Wait List Panel



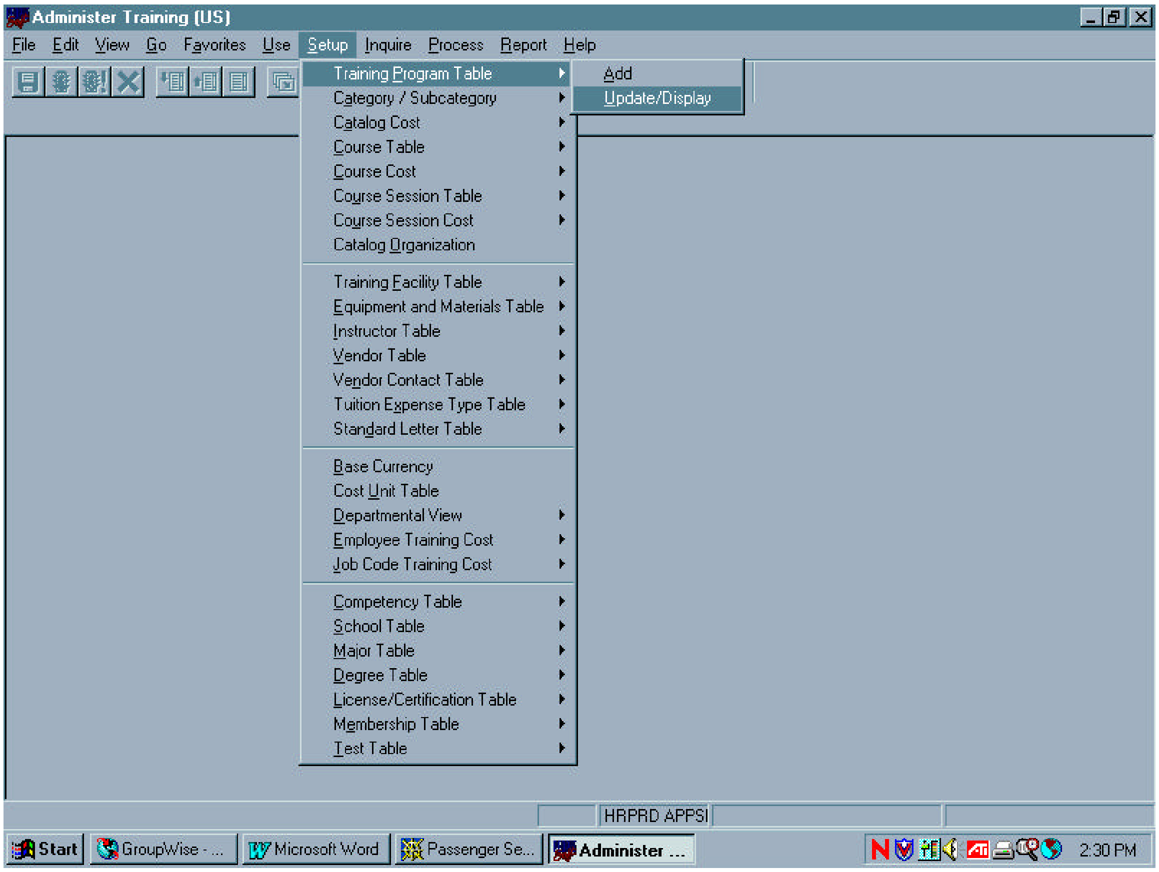
Find the students that did not get enrolled during Auto Enrollment, and change their current session number to the Next Available Session with vacancies.

Saving Changed Course Wait List Records

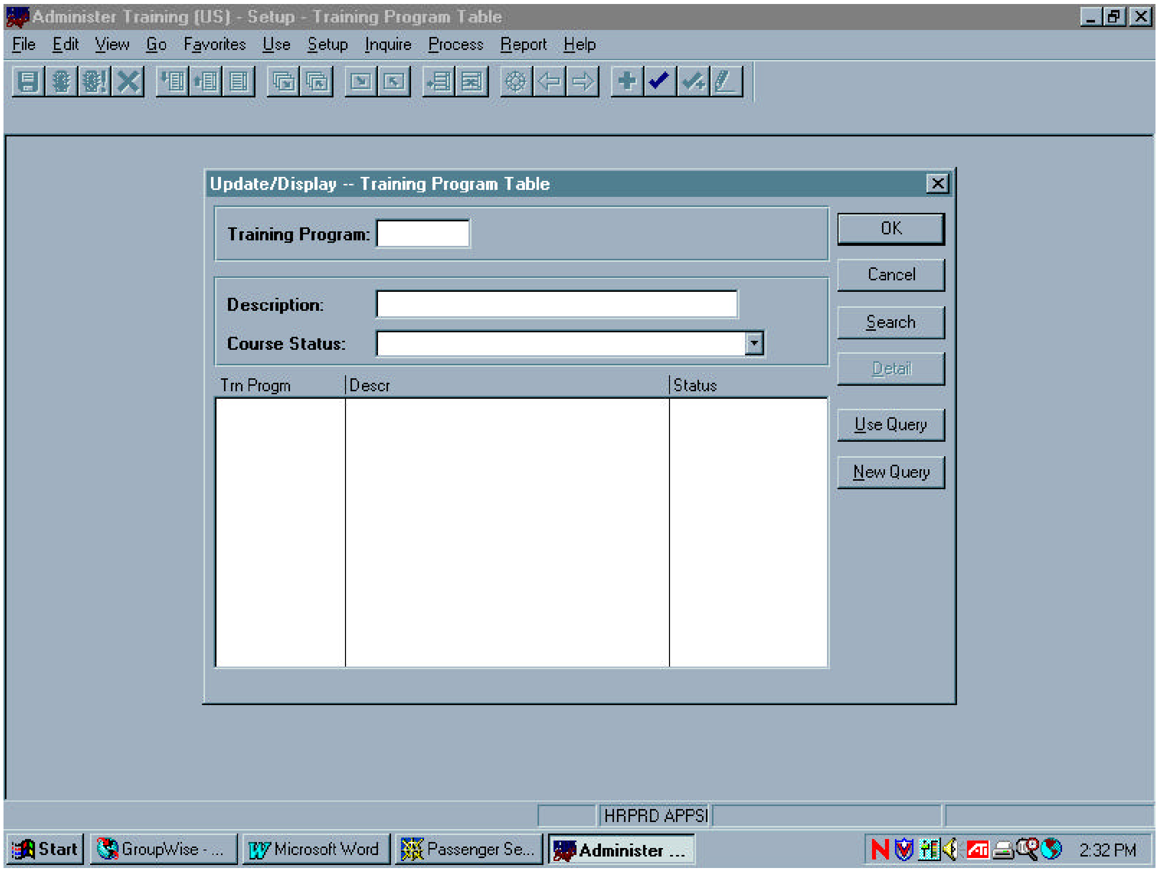
Click the “Save” Icon.

2.9 TRAINING PROGRAM

Navigate To Training Program Table: GO – DEVELOP WORKFORCE – ADMINISTER TRAINING – SETUP – TRAINING PROGRAM TABLE – UPDATE/DISPLAY

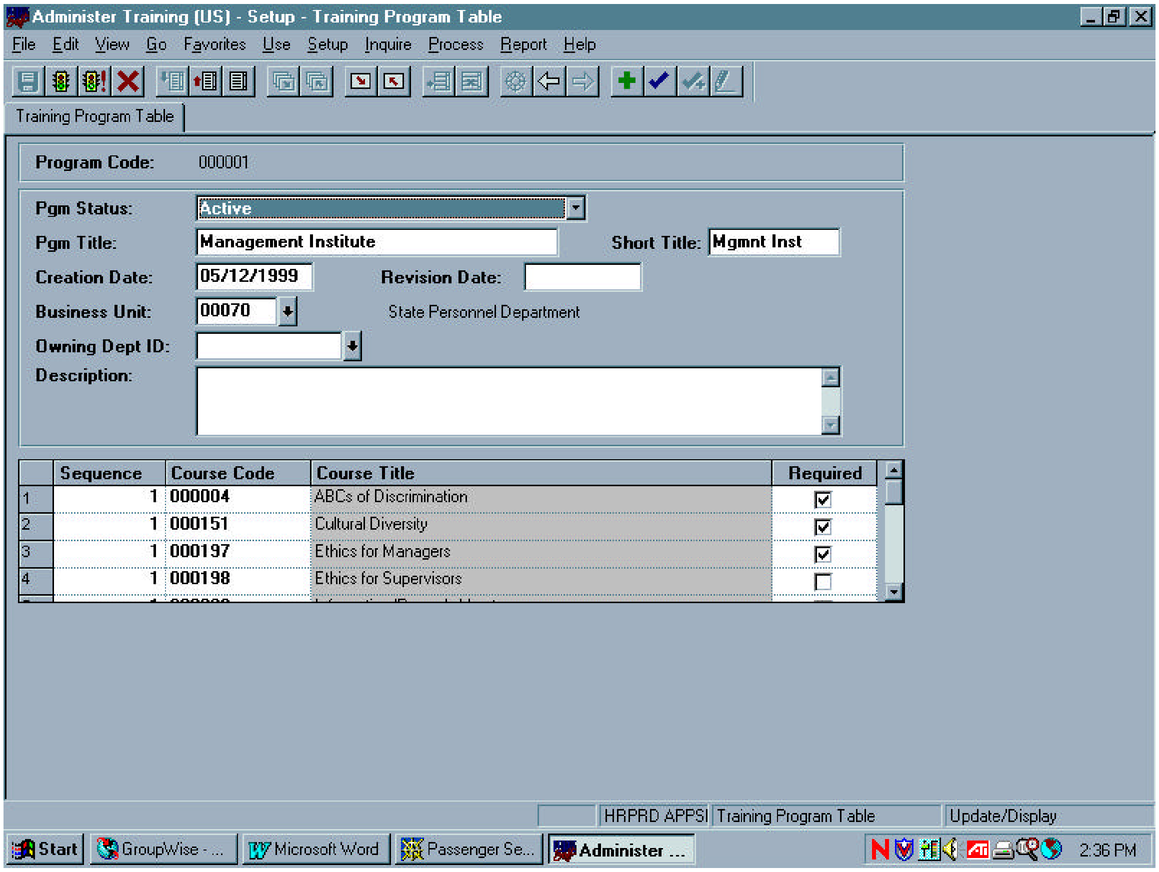


The following Search Box will appear:



Click the “OK” button here to display a list of the current Training Programs.

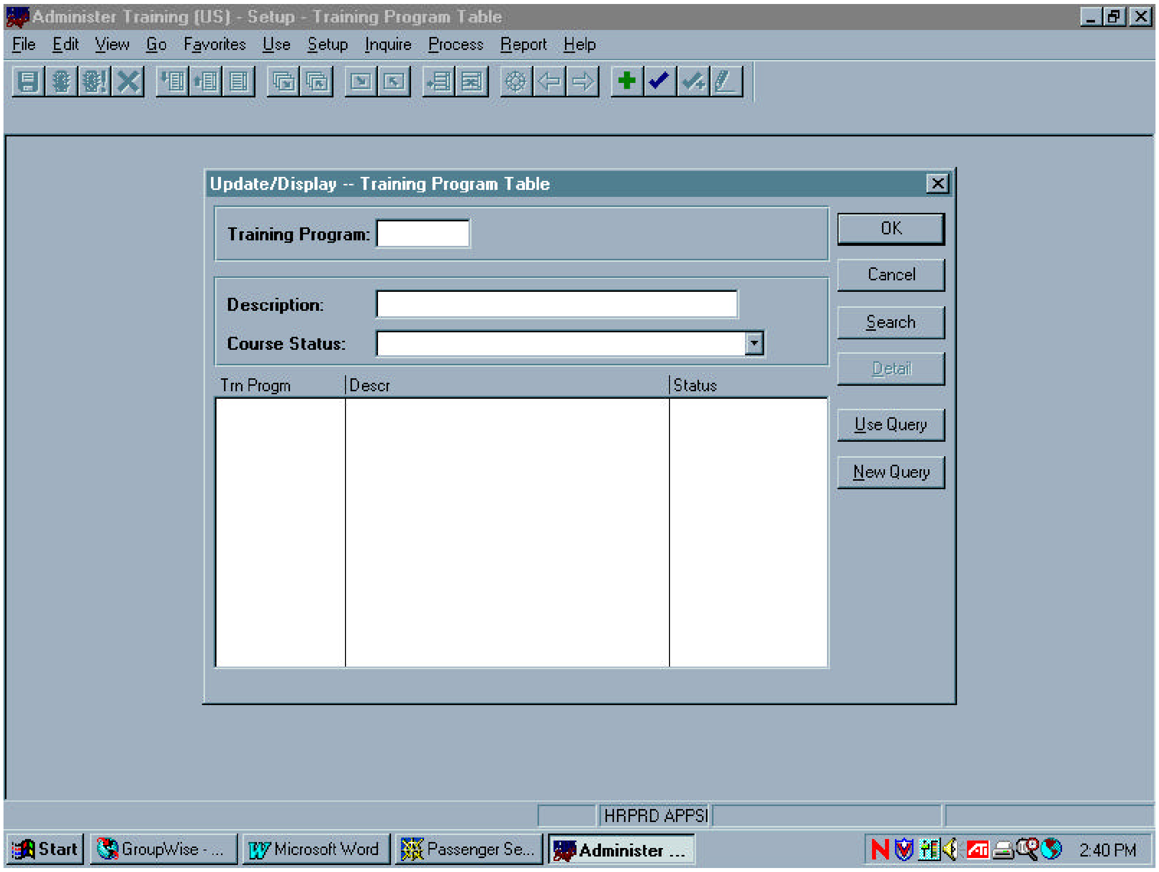
Training Program Table



Pgm Status: Defaults to "Active" (that is the correct choice).
Pgm Title: You decide (up to 30 characters)
Short Title: You decide (up to 10 characters)
Creation date: Date you are creating program
Revision date: Date you are revising a current program
Business Unit: Type appropriate Unit #, or click the drop down arrow and select from the Search box
Owning Dept: Optional – Used to further break down the Business Unit to Individual Dept.
Description: Optional – Free form typing.
Sequence: Used to indicate a specific order which courses within the program are to be taken
Course Code: Used to select a course to ADD to the Training Program. Click in the empty field. A drop down arrow will appear. Click the drop down arrow to display the Search Box for the Course Table, and select the desired course.

Course Title: Will default when you Tab out of the Course Code field.
Required: Optional field – Check on if attendance in course is a Requirement to complete the Training Program.

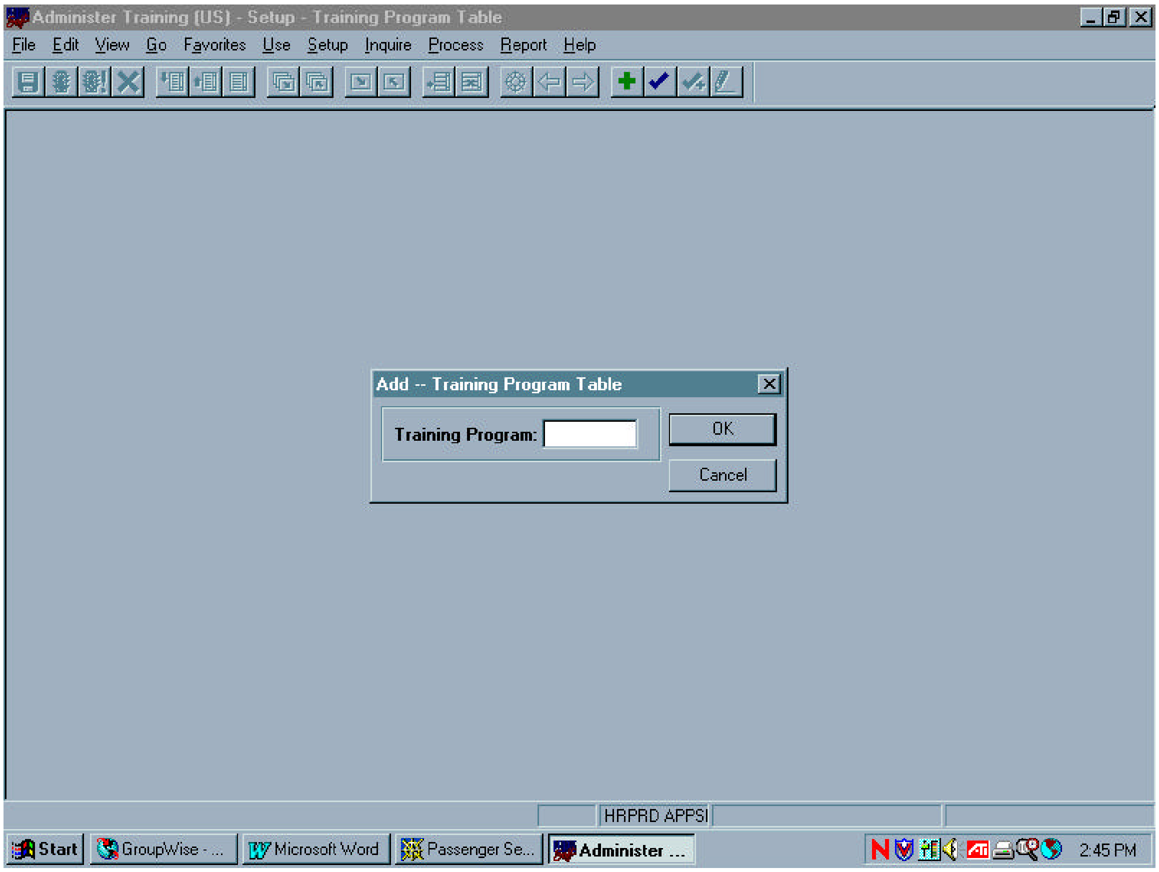
Adding A Training Program



NOTE: Prior to adding a new program, it is a good habit to first go to Update/Display Mode and take a look at the current Training Programs to ensure you do not Duplicate Training Codes and/or Titles. (see table above).

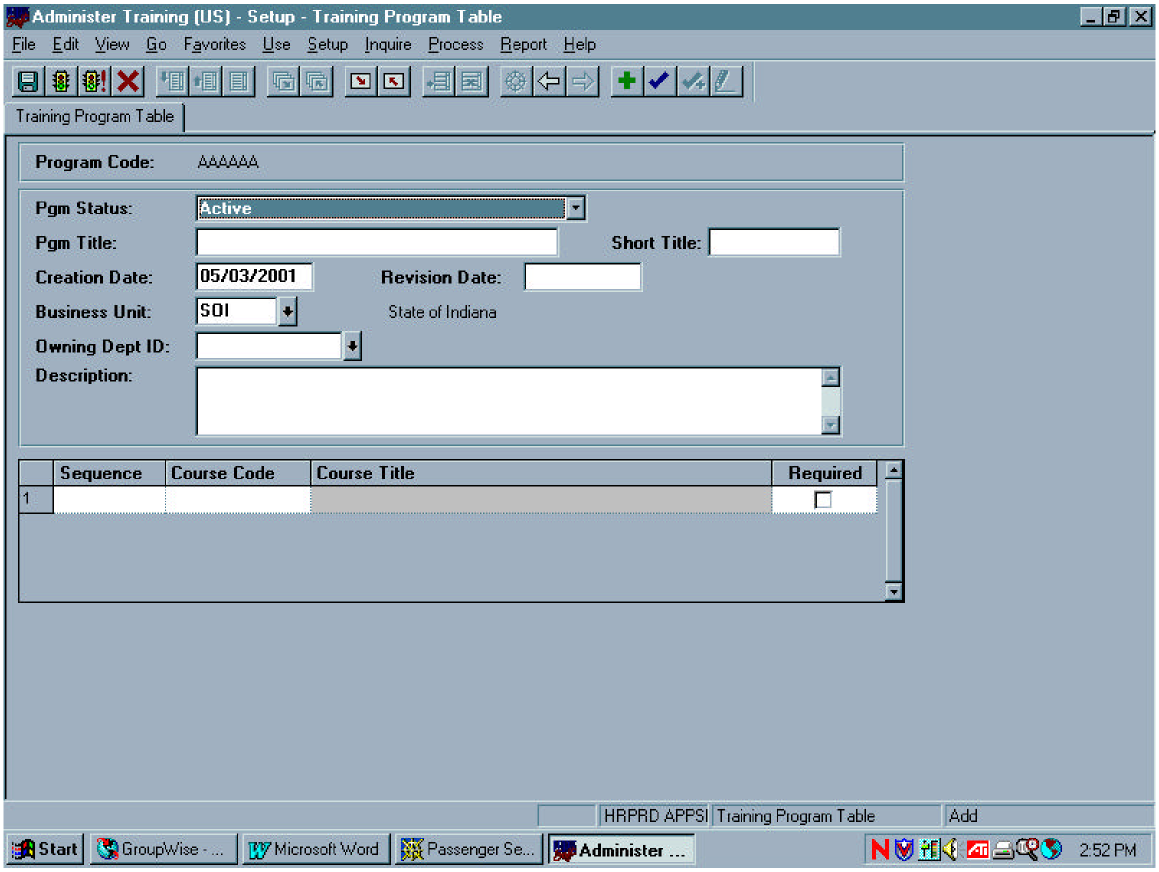
ADD TRAINING PROGRAMS

Navigate To Training Programs: GO – DEVELOP WORKFORCE – ADMINISTER WORKFORCE (U.S.) – SETUP - TRAINING PROGRAM TABLE - ADD



Training Program: Enter your desired program code:

> **NOTE:** You will probably want to Smart Code here, Using something to tie back to your agency and the type of program this will be. Any combination of numbers and/or letters may be used (up to 6 digits/characters).



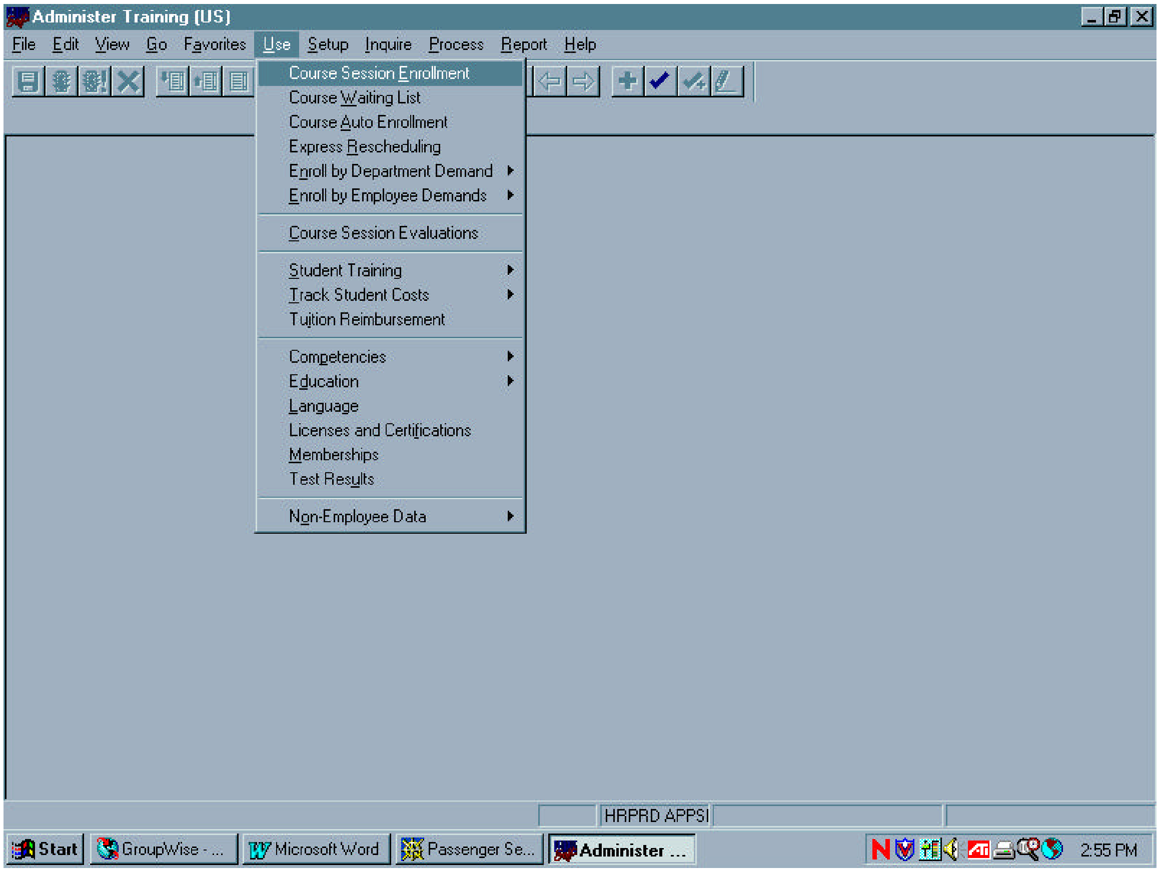
EXERCISE # 6

Using pages 38 - 43 of the manual to assist you, complete the Training Program and add 5-10 courses.

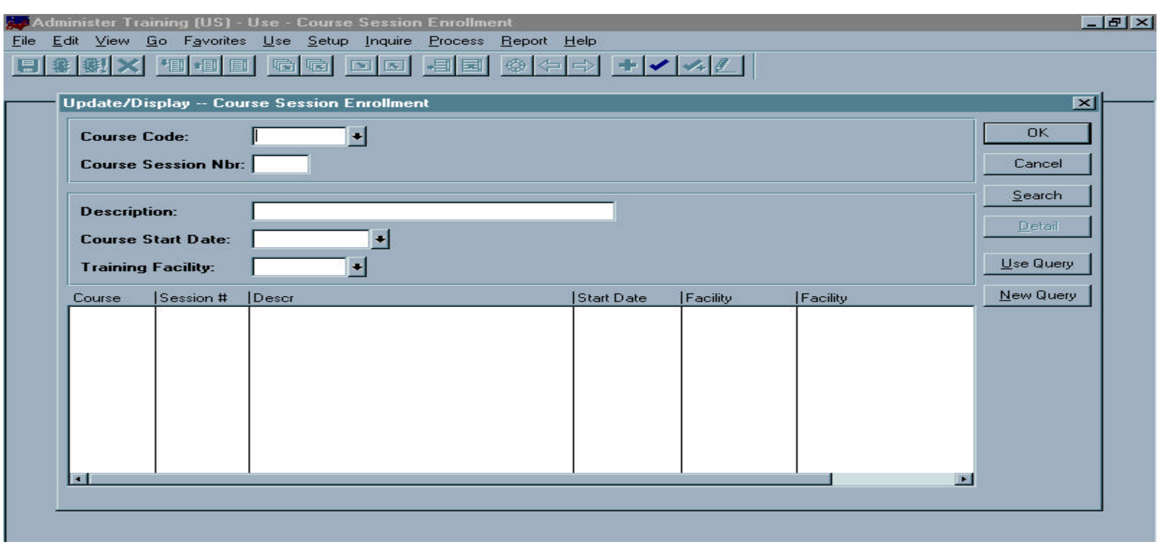
2.10 CLOSING OUT COURSES

STEP 1 – Work The Sign-in Sheet.

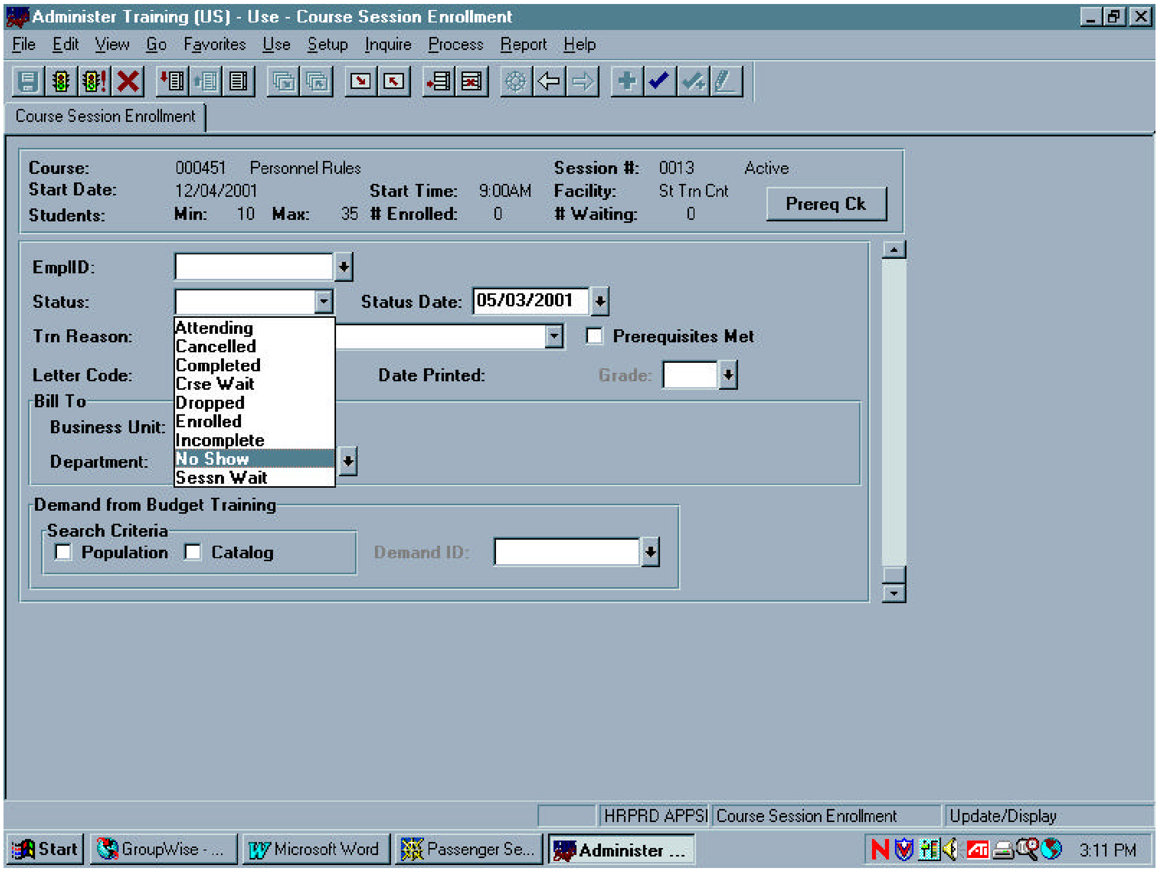
Navigate To The Course Session Enrollment Panel – GO – DEVELOP WORKFORCE – ADMINISTER TRAINING (U.S.) – USE – COURSE SESSION ENROLLMENT



Course Code: Enter the Code for the course to be closed. A list of all the sessions will appear in the list area. Select the appropriate session you wish to close.



CLOSING OUT COURSES
STEP 1 - continued



Utilizing your Sign-in sheet, identify the names of individuals that did not show for The class.

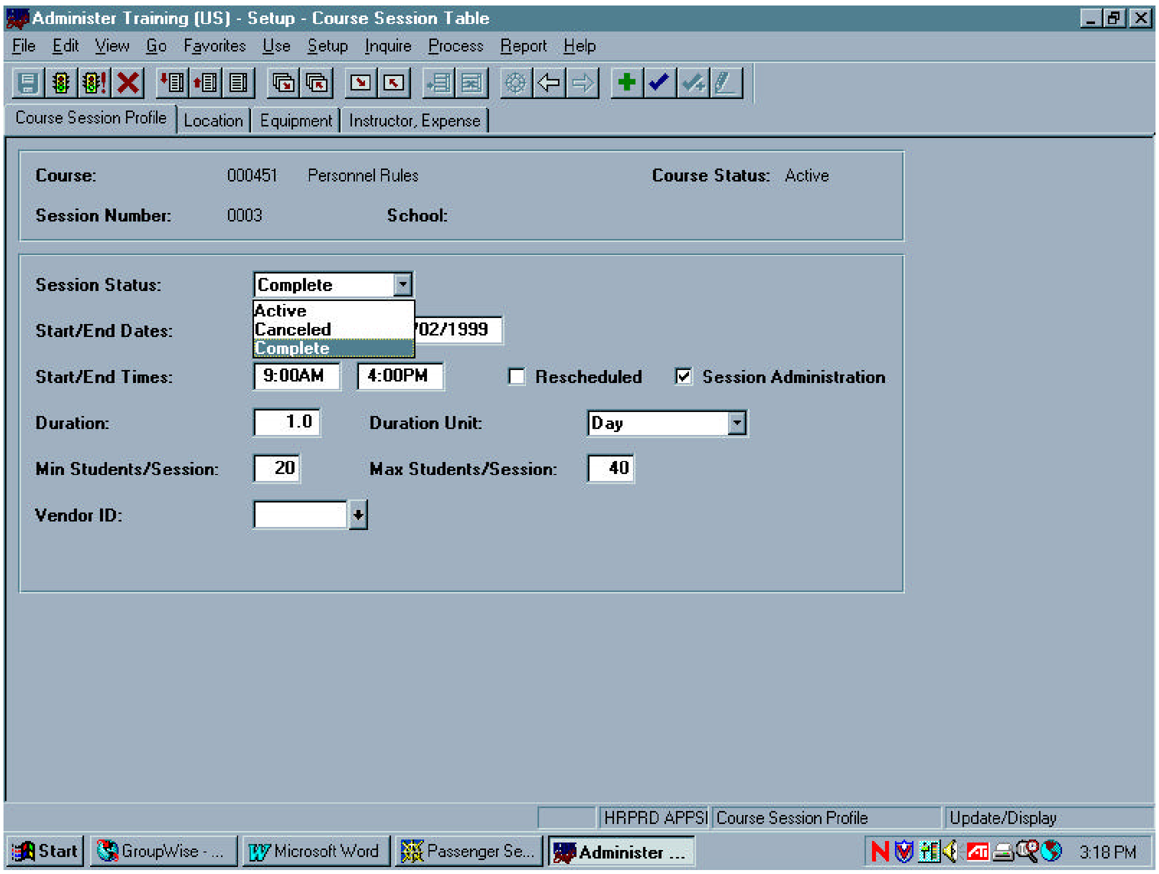
Scroll through the Course Session Enrollment Panel and change the status from “Enrolled” to “No Show” for the individuals that did not sign in. (see table above).

Save the record upon completion.

CLOSING OUT COURSES

STEP 2 – Complete The Class

Navigate To The Course Session Table: GO – DEVELOP WORKFORCE – ADMINISTER TRAINGIN (U.S.) – SETUP – COURSE SESSION TABLE – COURSE SESSION PROFILE - UPDATE/DISPLAY.



From the Search Box, if applicable, select the Course & Session you are closing out. Change the Session Status to Complete. (see table above).

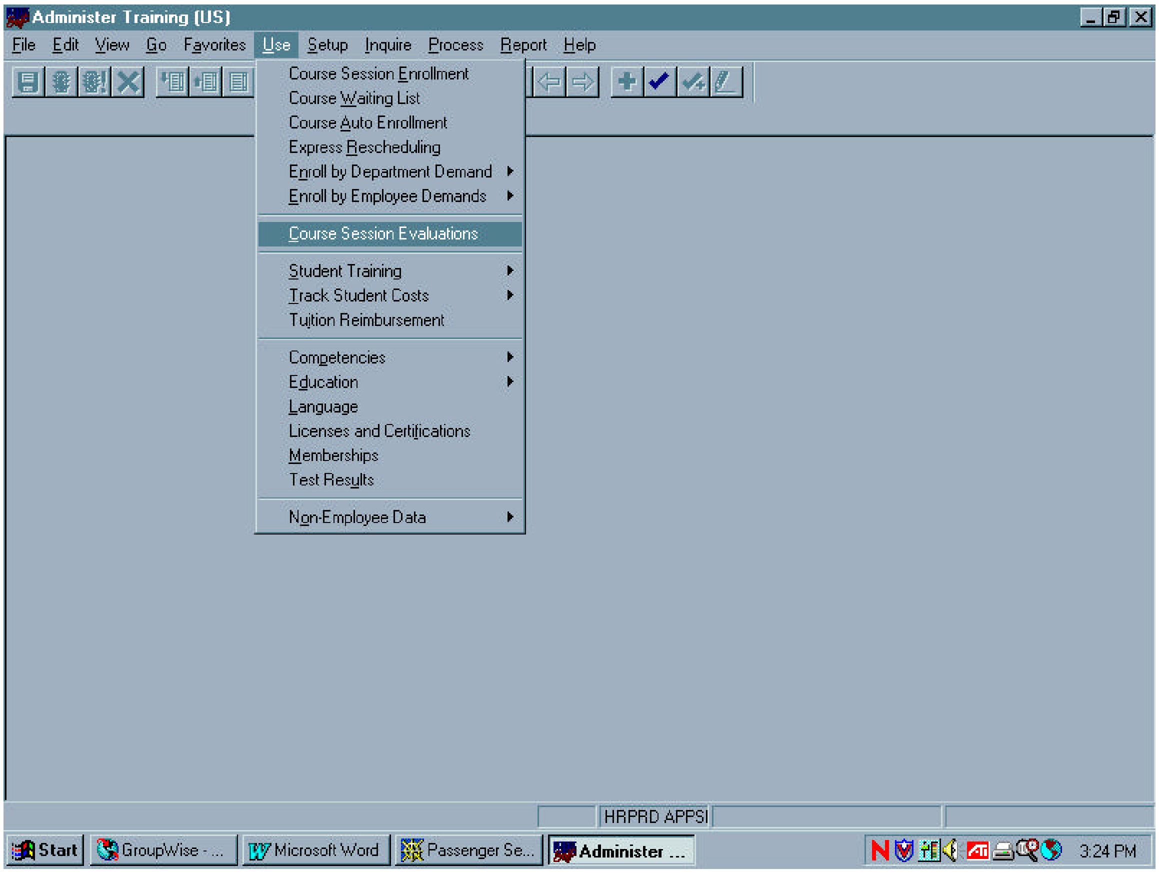
NOTE: Changing the status to complete will automatically update all the students records.

Save the record.

CLOSING OUT COURSES

STEP 3 – Evaluate The Course

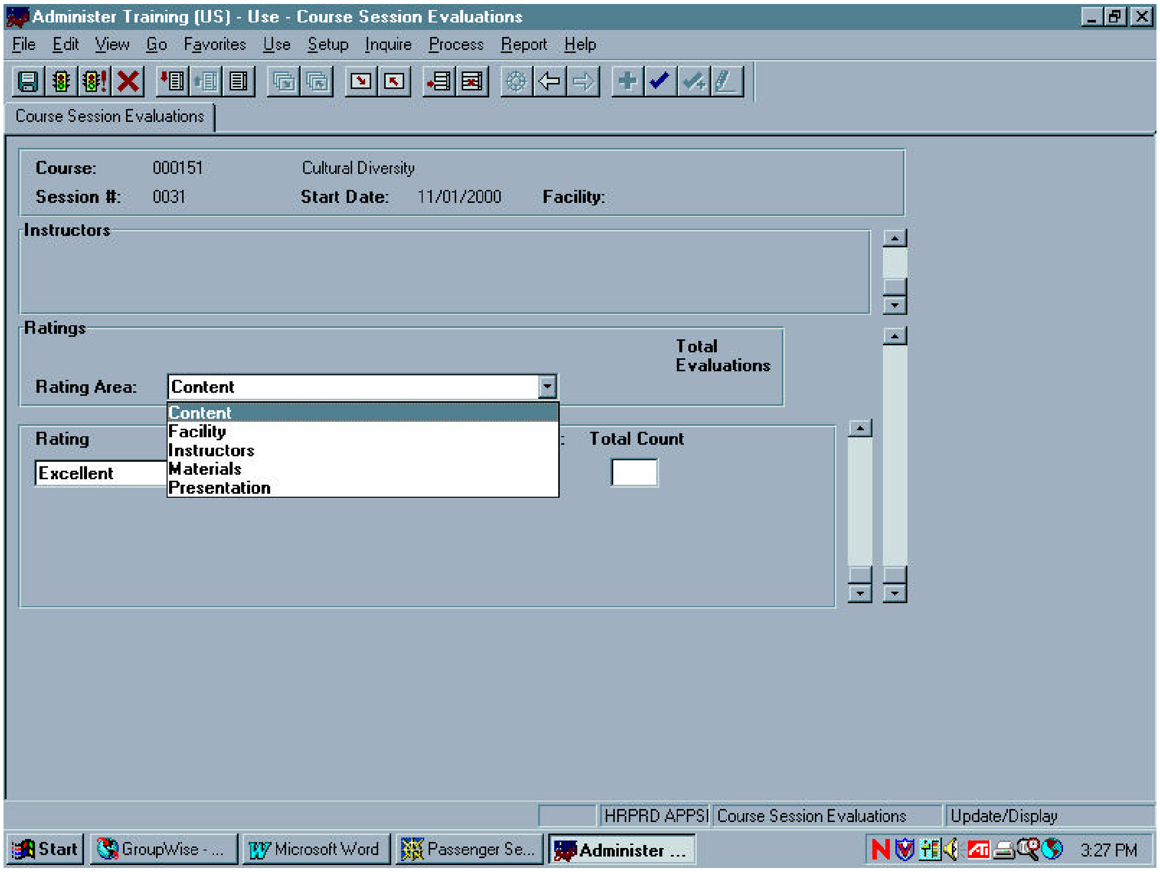
Navigate To Course Session Evaluations Panel: GO – ADMINISTER TRAINING – USE – COURSE SESSION EVALUATIONS



Solicited student comments of sessions contribute to effective training courses. Another contribution is the review of session statistics, including the number of responses per rating, average ratings, and the overall average for the session.

CLOSING OUT COURSE

STEP 3 – continued



From the Search Box, if applicable, select the Course & Session you are closing out.

Rating Area: Click the drop down arrow and select one of the five choices available. (see table above)

Rating: Click the drop down arrow and select one of the four choices. (see table above)

Total Count: Indicate the number of students that selected that particular rating for the above rating area.

NOTE: UTILIZING THE INSERT A ROW ICON, ADD THE REMAINING RATINGS FOR THAT PARTICULAR RATING AREA.

Upon completion of all ratings for the first Rating Area, again utilize the insert a row icon (this time to select a new Rating Area) and follow the above steps for indication ratings.

Follow these same procedures for all five Rating Areas.

Save the record.

NOTE: Upon saving, please notice that PeopleSoft will provide an average rating for each area, (scroll up and down to view) and an overall session average.

EXERCISE # 7

Use pages 44 - 49 of the manual to assist you. Complete Step 1-Work the sign-in sheet (no shows), Step 2 –Complete the Course, and Step 3 – Evaluate the Course, to close out the course.

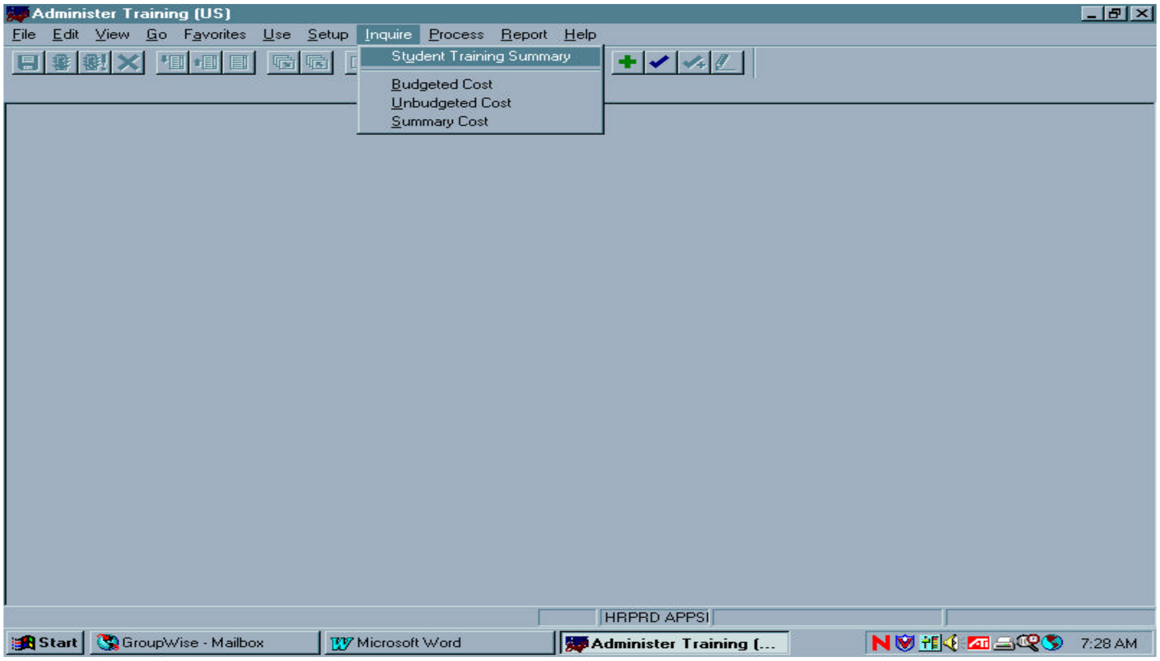
Close the 2nd Course Session created in Exercise # 1.

NOTE: Evaluation are as follows:

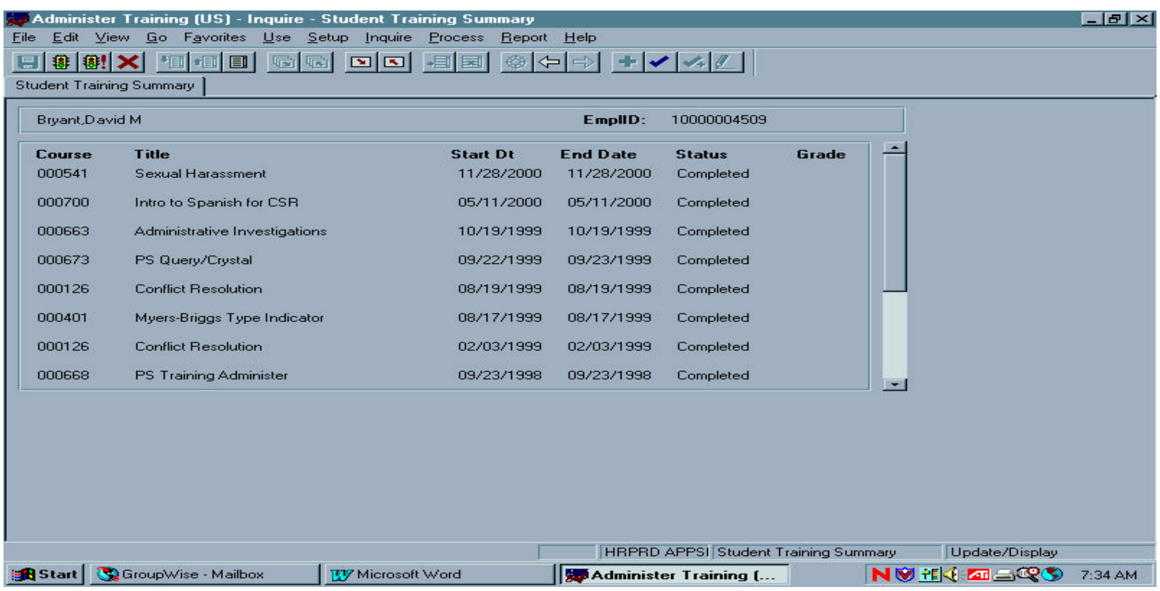
Rating Area	**Rating**
Content	Excellent = 25, Good = 5, Fair = 5
Instructor	Excellent = 30, Good = 5
Facility	Good = 20, Fair = 5, Poor = 5
Materials	Good = 35
Presentation	Excellent = 30, Good = 5

2.11 **STUDENT TRAINING**

Navigate To Student Training Summary: GO – DEVELOP WORKFORCE – ADMINISTER TRAINING (U.S.) – INQUIRE – STUDENT TRAINING SUMMARY



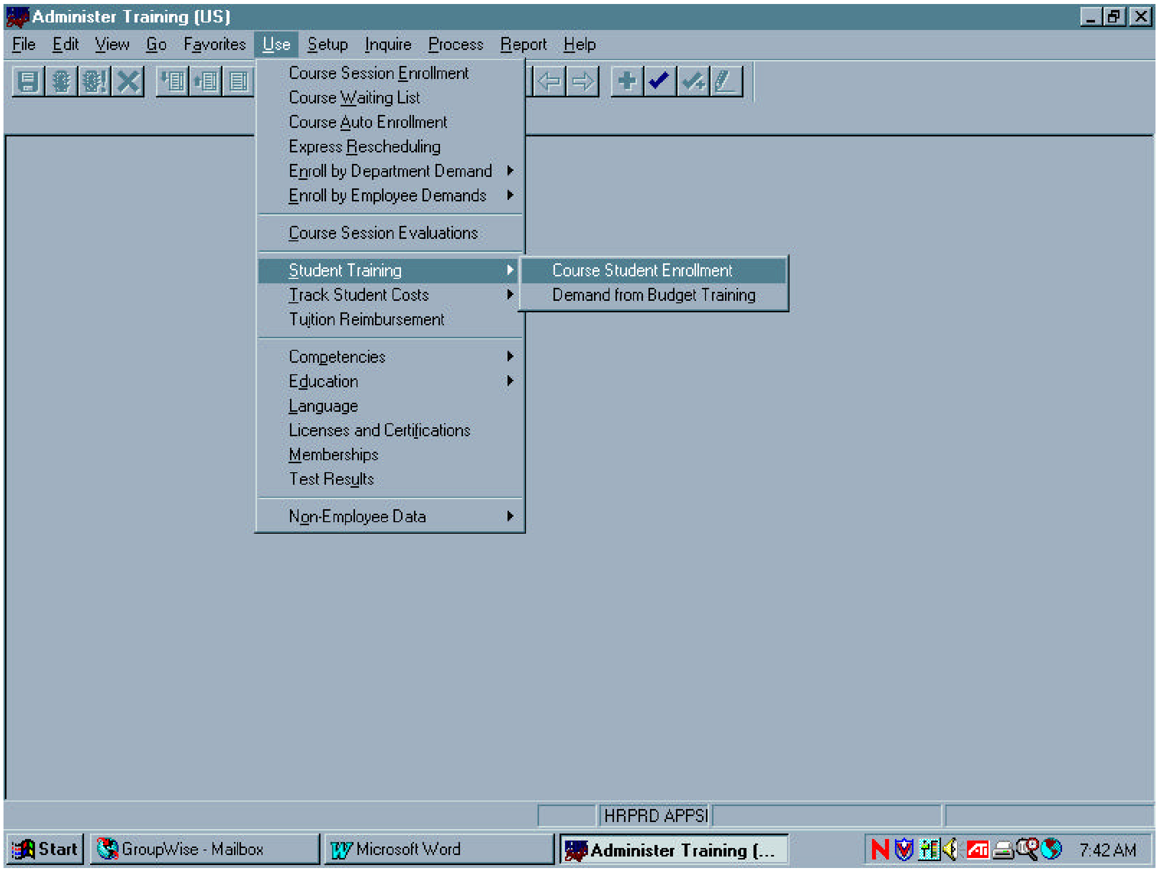
From the Search Box, select the Employee whose Training Record you would like to view.



NOTE: This brief summary will only provide a list of completed courses, or currently enrolled courses.

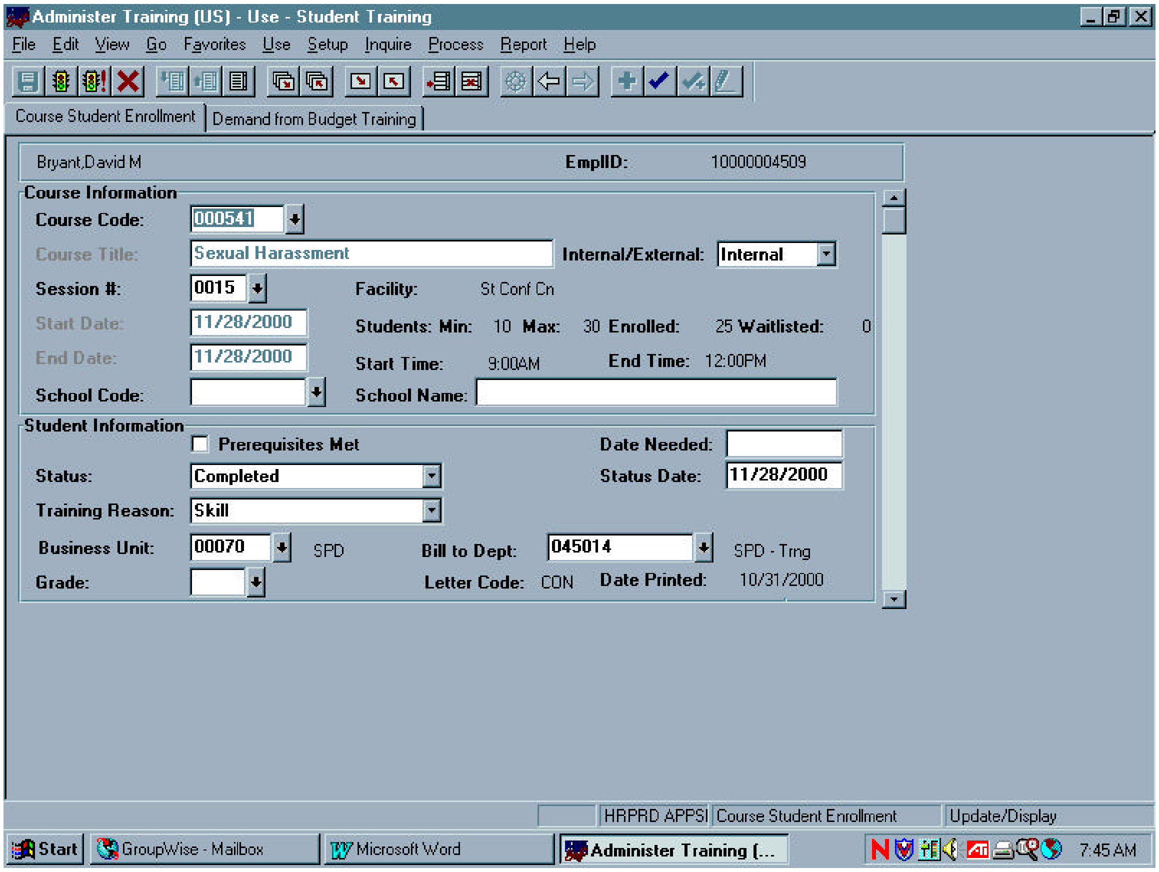
TRAINING RECORDS

Navigate To The Student Training Panel: GO – DEVELOP WORKFORCE – ADMINISTER TRAINING – USE – STUDENT TRAINING – COURSE STUDENT ENROLLMENT



From the Search Box, select the individual whose Training Records you would like to view.

TRAINING RECORDS



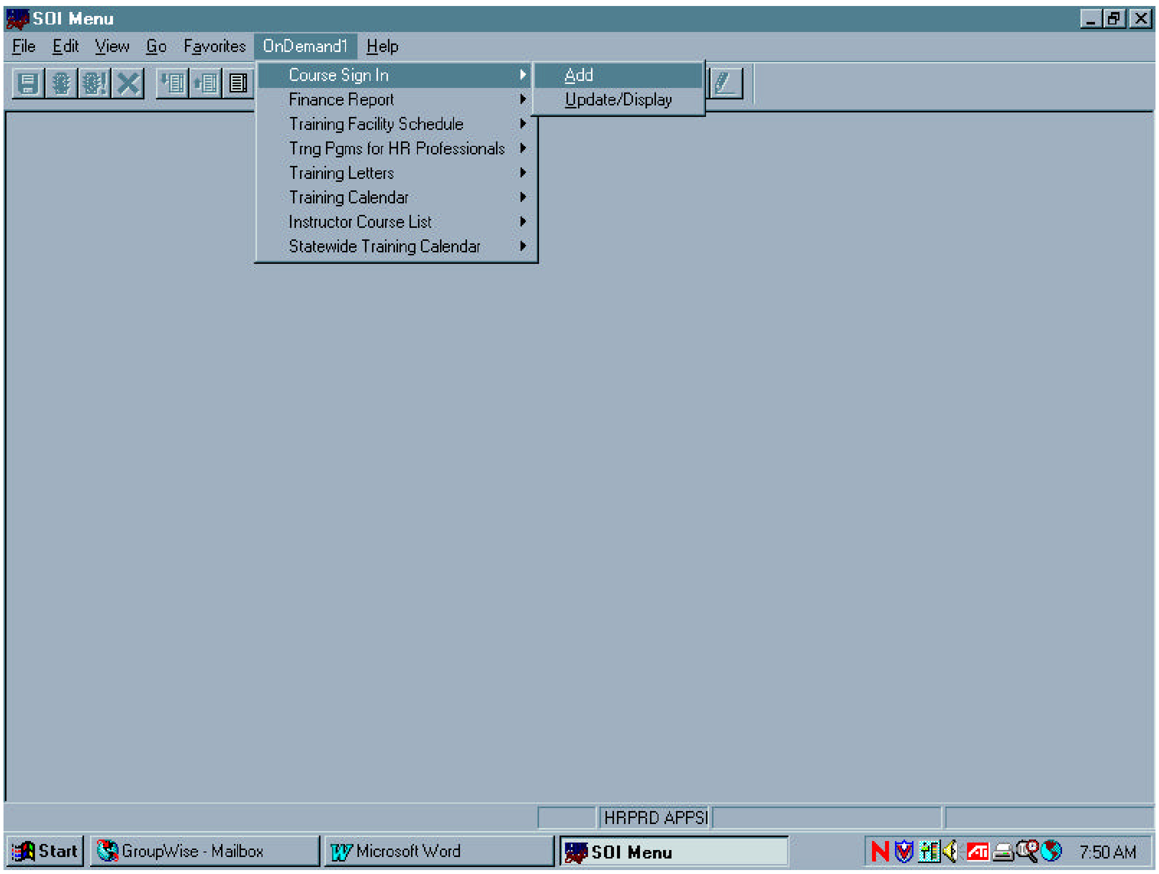
NOTE: This detailed summary will provide an individual screen shot with detailed Information regarding course enrollment, completion, drops, no-shows, incompletes, etc. (see status field above)

Use the scroll bar to obtain information on each course.

2.12 TRAINING REPORTS

Course Sign-in Sheets

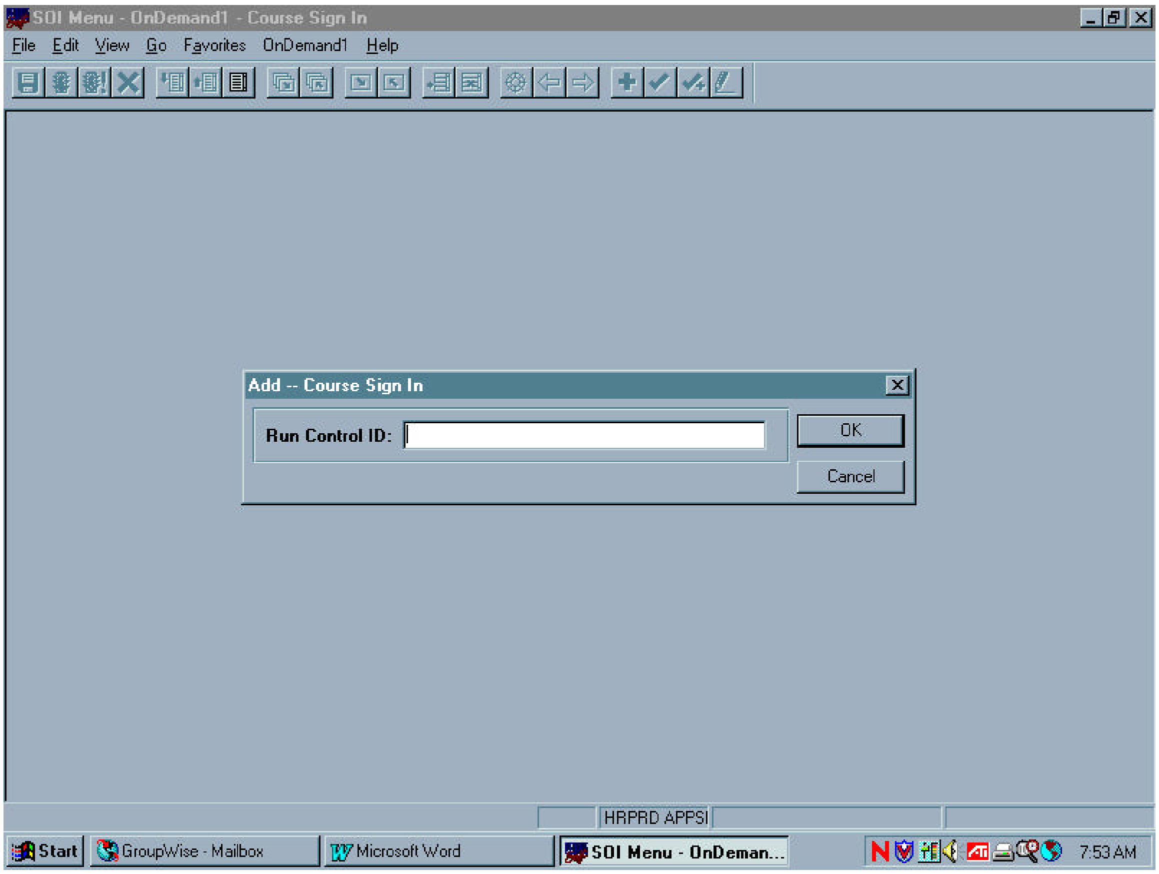
Navigate To The Course Sign-In Sheets: GO – SOI MENU – ONDEMAND1 – COURSE SIGN IN – ADD



NOTE: The first time you run a report, you will need to select "ADD" (see table above) to Incorporate a Run Control ID into the System. After the first report is run, each Subsequent report you will navigate to "Update/Display" mode.

TRAINING REPORTS

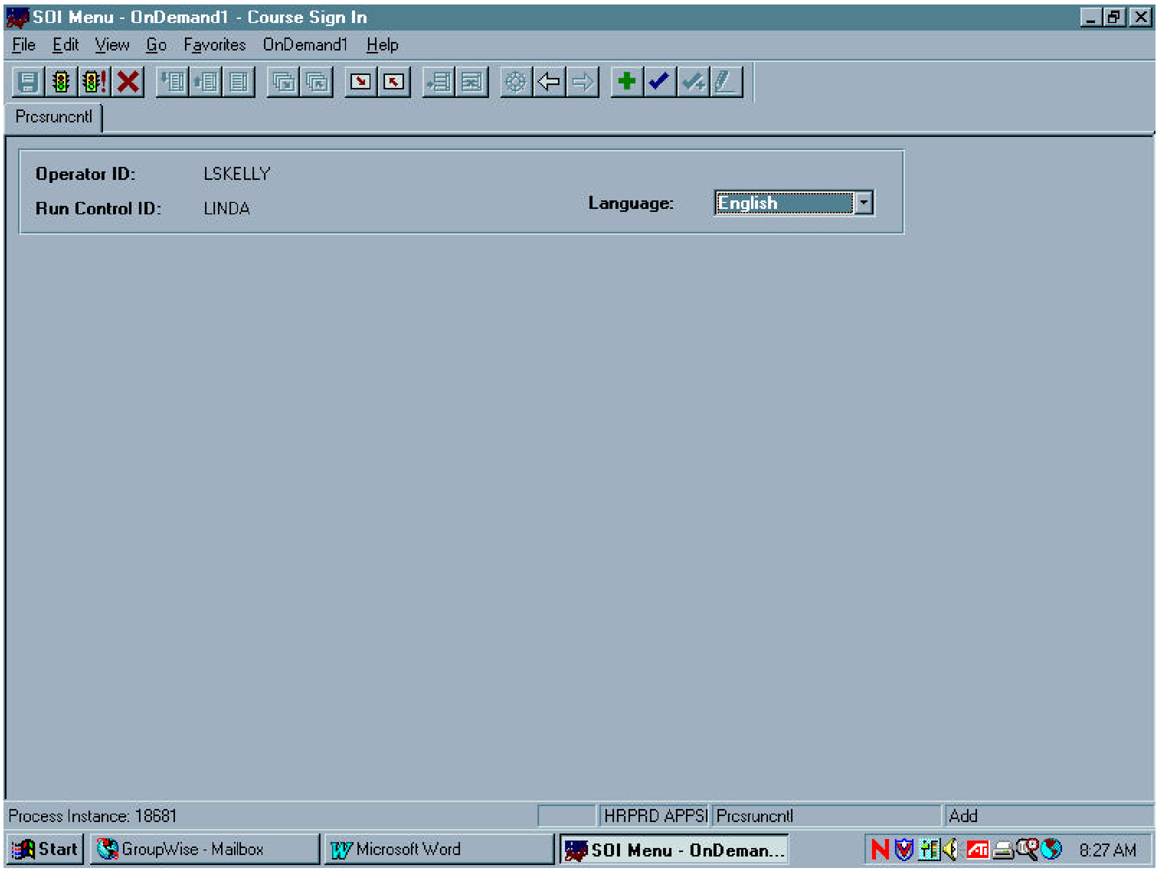
Course Sign-in Sheets



Run Control ID: Enter your first name.

TRAINING REPORTS

Course Sign-in Sheets

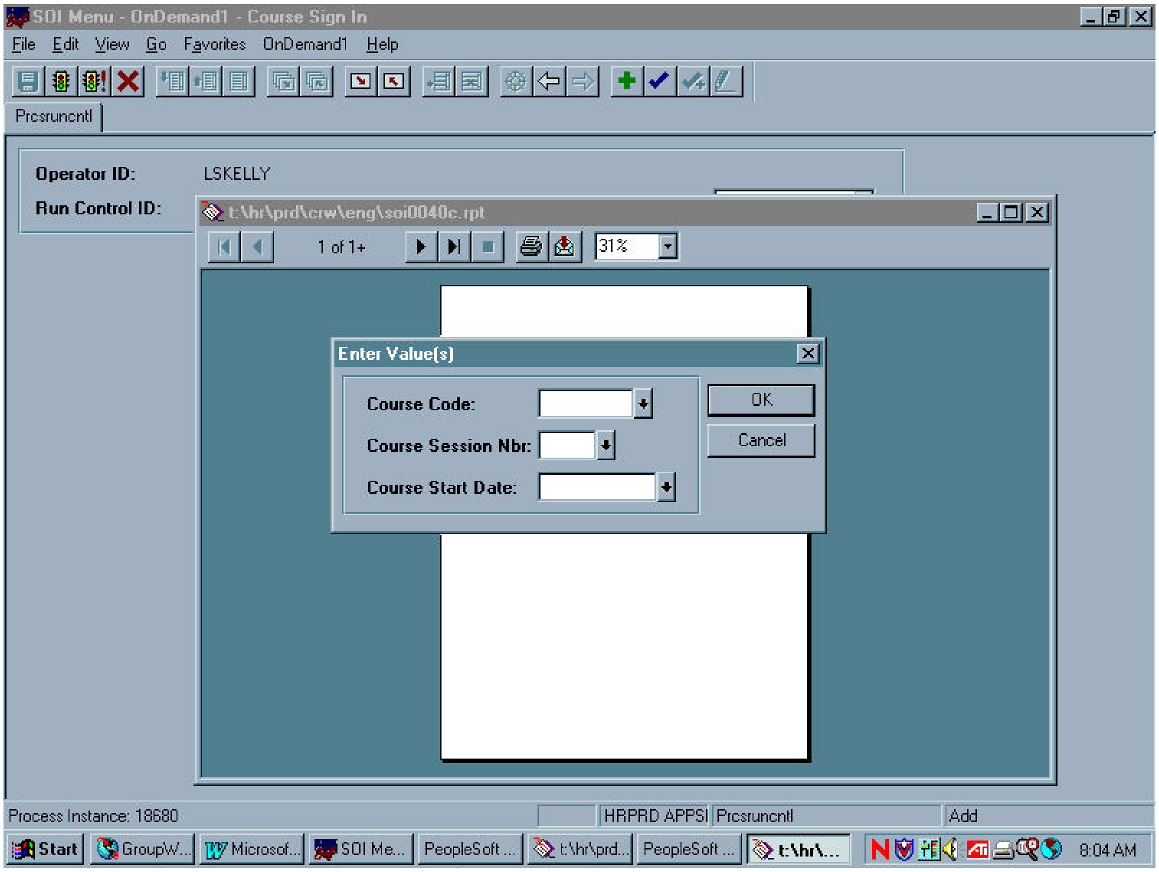


From the Run Control ID, the above panel will appear.

Click the first Stop Light Icon to Run Report.

TRAINING REPORTS

Course Sign-in Sheets



Upon Running Report, the above window will appear.

Course Code: Enter the Course Code of the course for which you would like a sign-in sheet made, or click the drop down arrow and locate the course from the Search Box.

Course Start Date: Enter the Session # of the Course, (if unknown, click the drop down arrow and locate the correct course for the Search Box

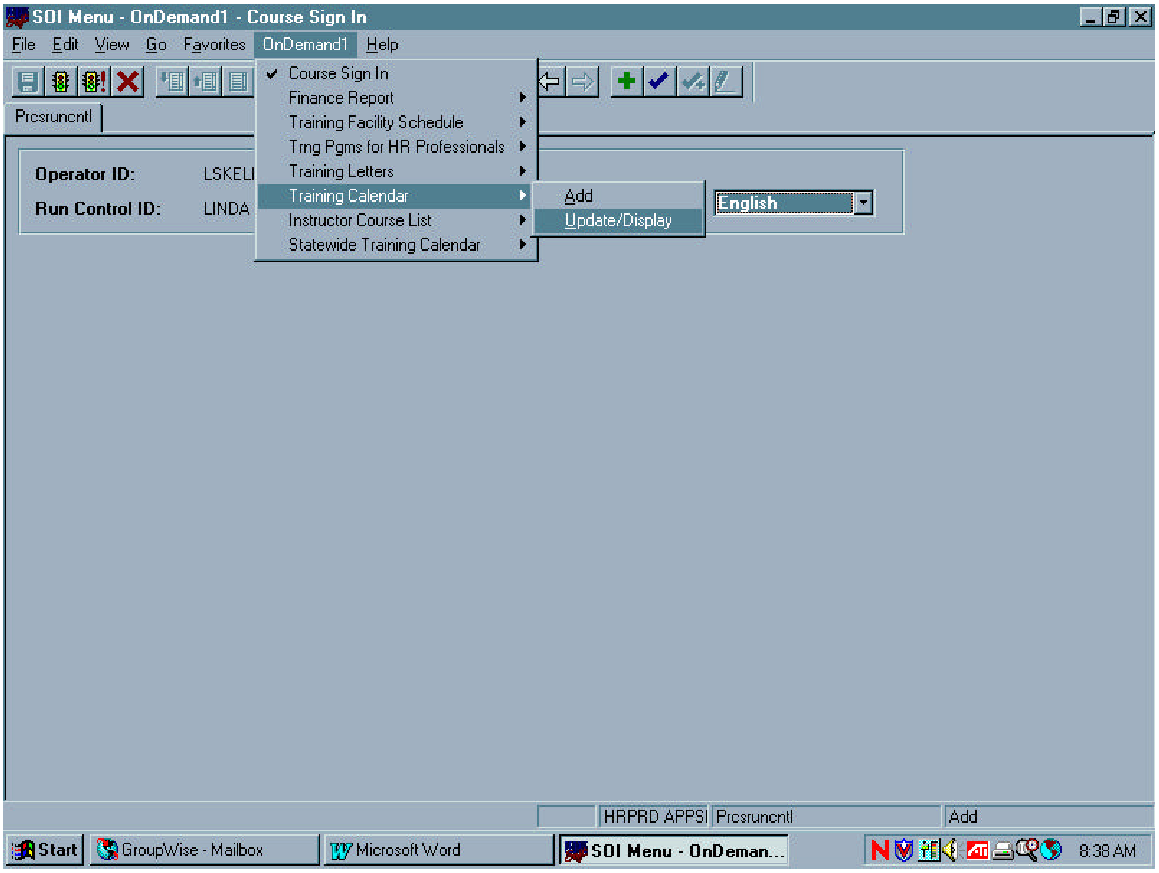
Session # : Enter the Start Date of the course. (MMDDYY)

Click “OK”.

TRAINING REPORTS

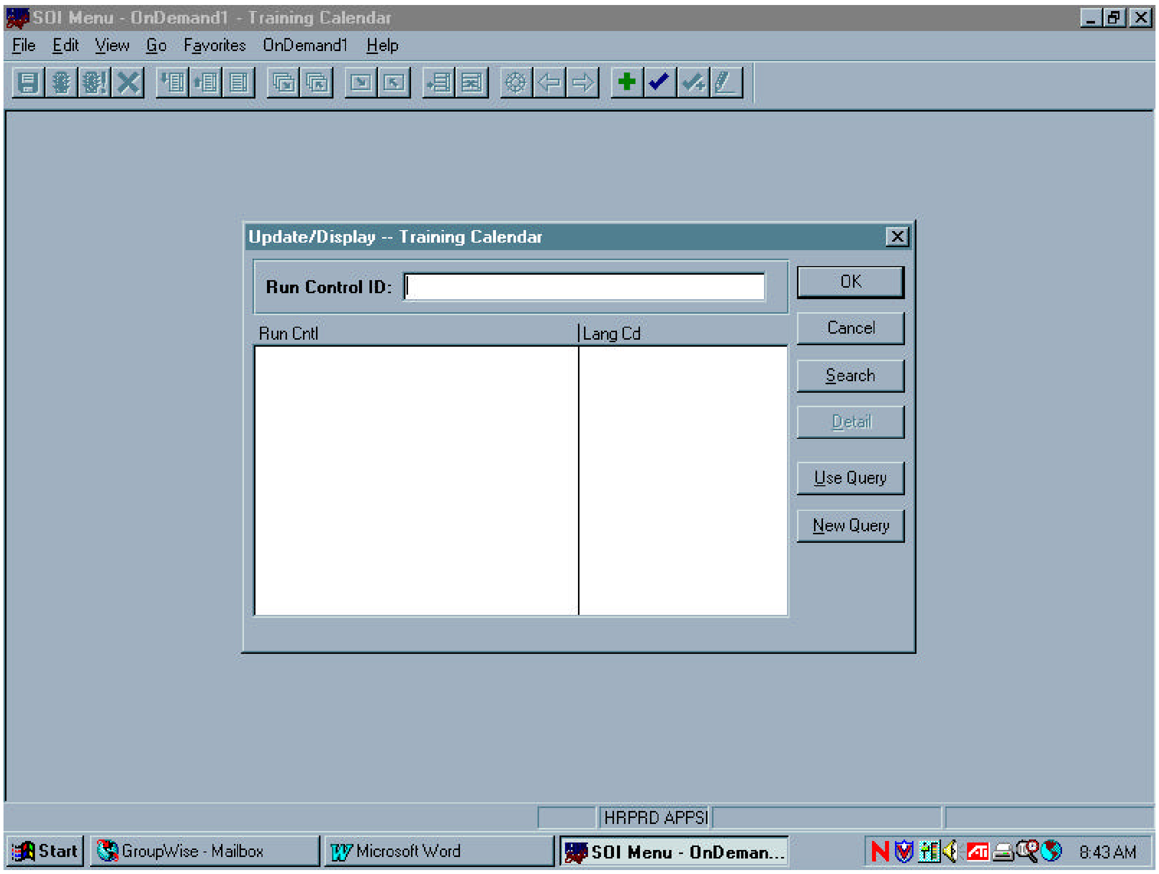
Training Calendar

Navigate To The Training Calendar: GO – SOIMENU – ONDEMAND1 – TRAINING CALENDAR – UPDATE/DISPLAY



TRAINING REPORTS

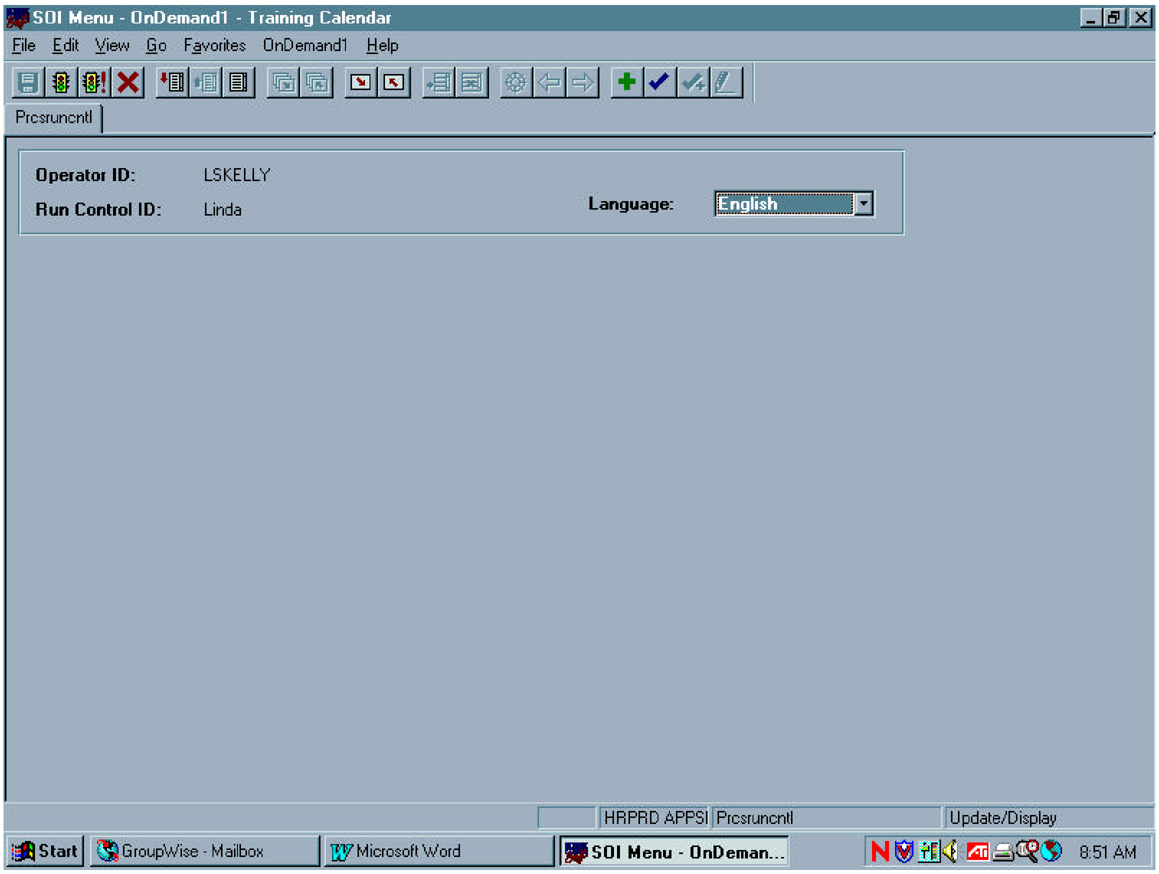
Training Calendar



NOTE: The Run Control ID was added previously when running a Course Sign-in Sheet. Now, in "Update/Display" mode, simply click the "OK" button.

TRAINING REPORTS

Training Calendar

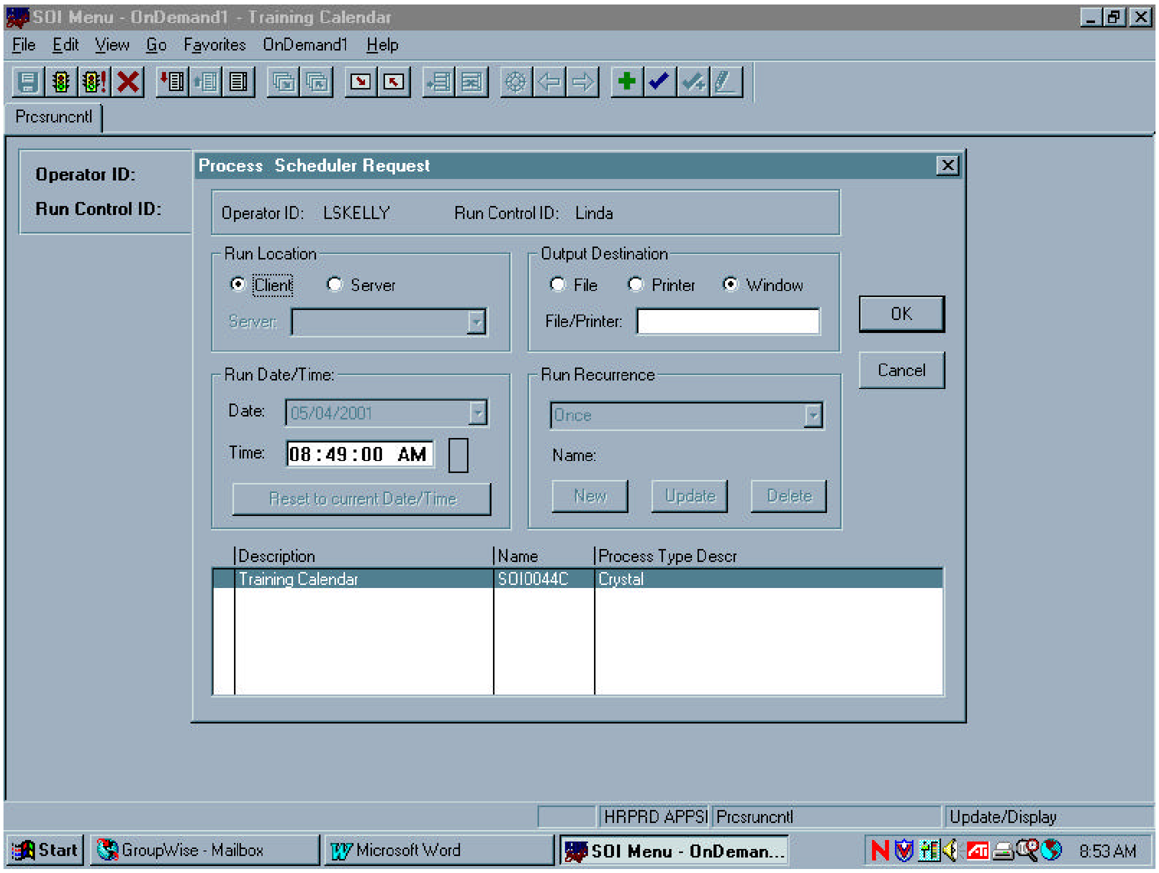


The above panel will appear.

Click the first Stop Light Icon to Run Report.

TRAINING REPORTS

Training Calendar

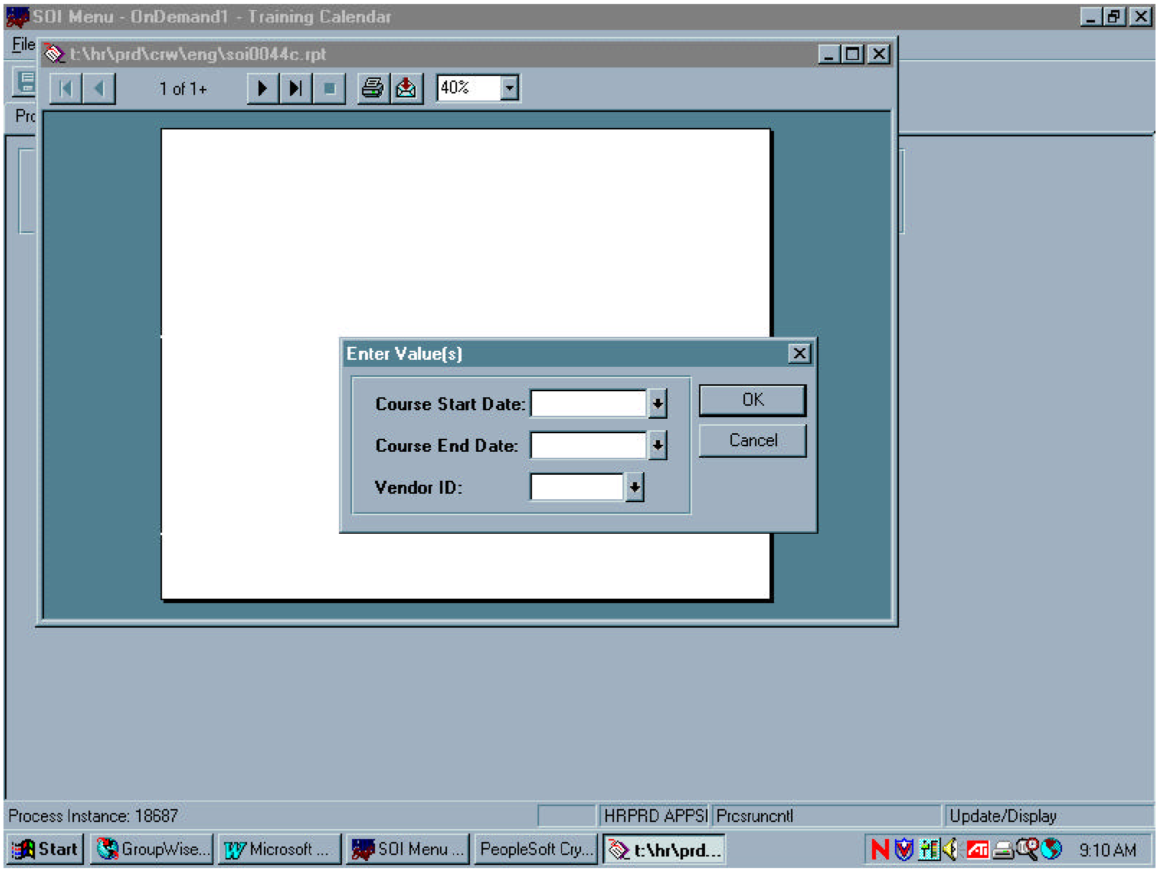


Upon Running Report , the above window will appear.

Choose the “Window” option and click “OK”.

TRAINING REPORTS

Training Calendar



The above panel will appear.

Select the Beginning and Ending dates for which the calendar is to be run. (MMDDYY)

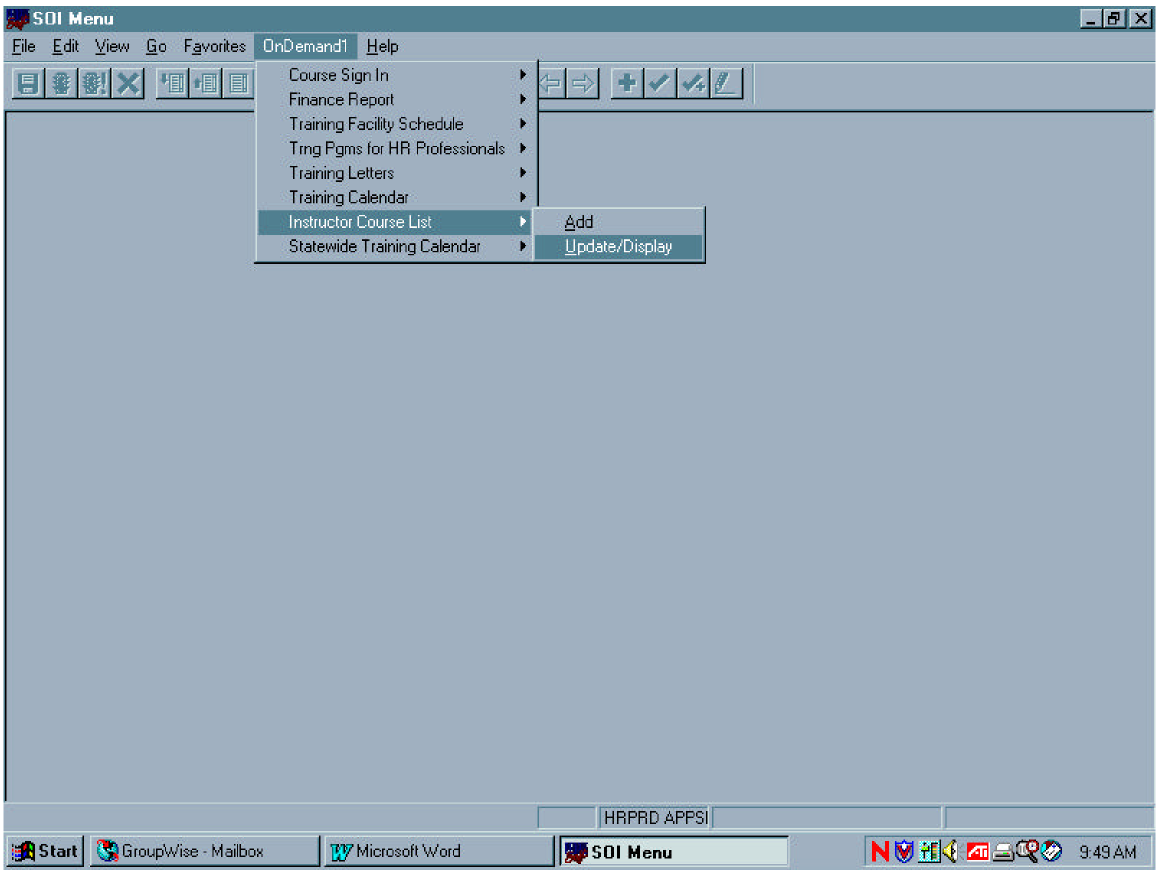
Vendor ID: Enter the Business Unit for which the calendar is to be run, or click the drop down arrow to locate the appropriate Unit # via the Search Box.

Click the “OK” button to Run Report.

TRAINING REPORTS

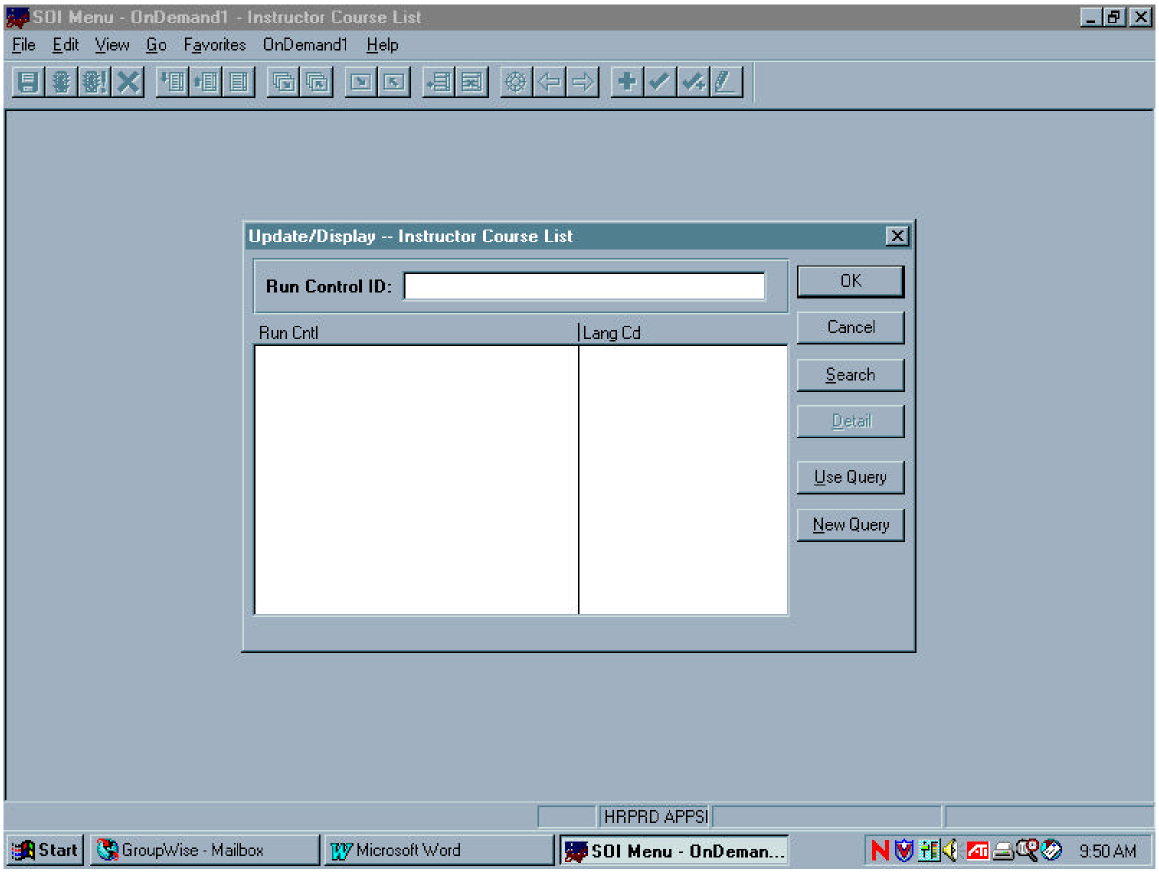
Instructor Course List

Navigate To The Instructor Course List: GO – SOIMENU – ONDEMAND1 – INSTRUCTOR COURSE LIST – UPDATE/DISPLAY



TRAINING REPORTS

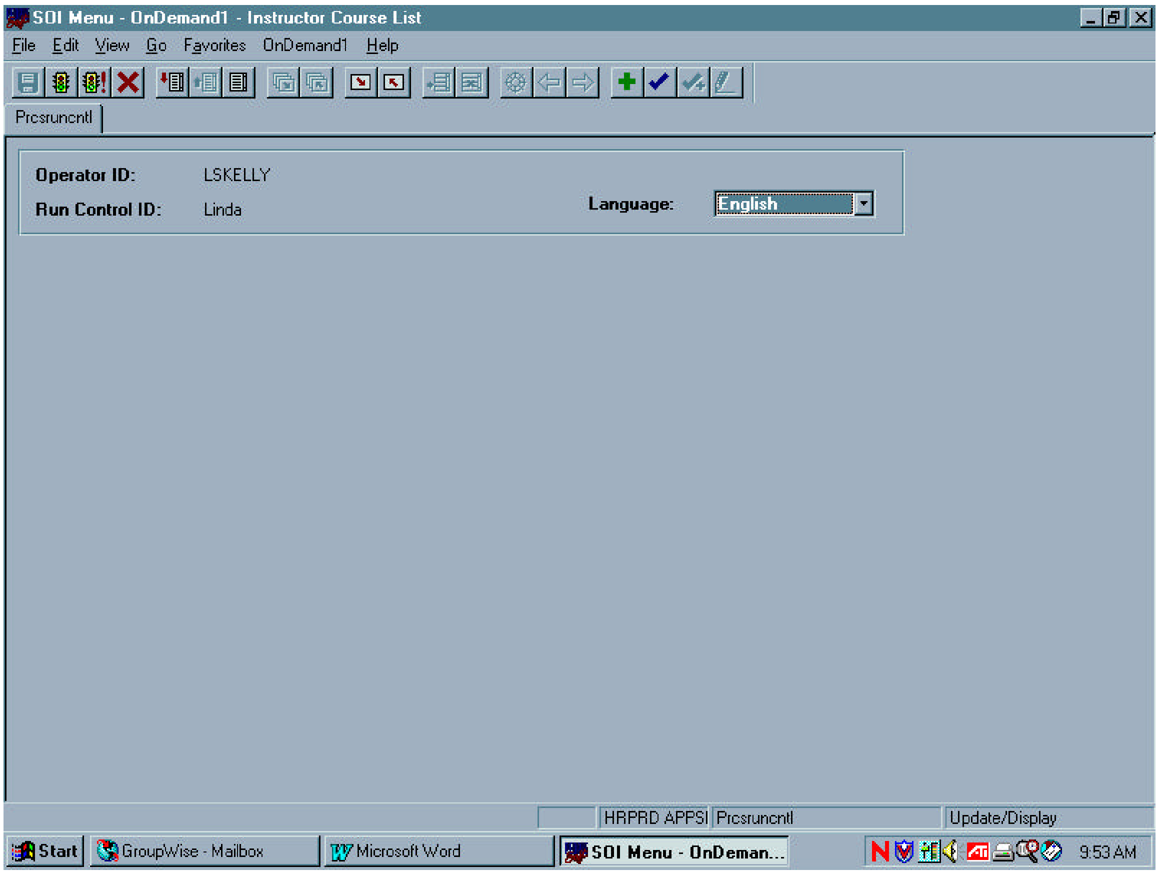
Instructor Course List



Click the “OK” button.

TRAINING REPORTS

Instructor Course List

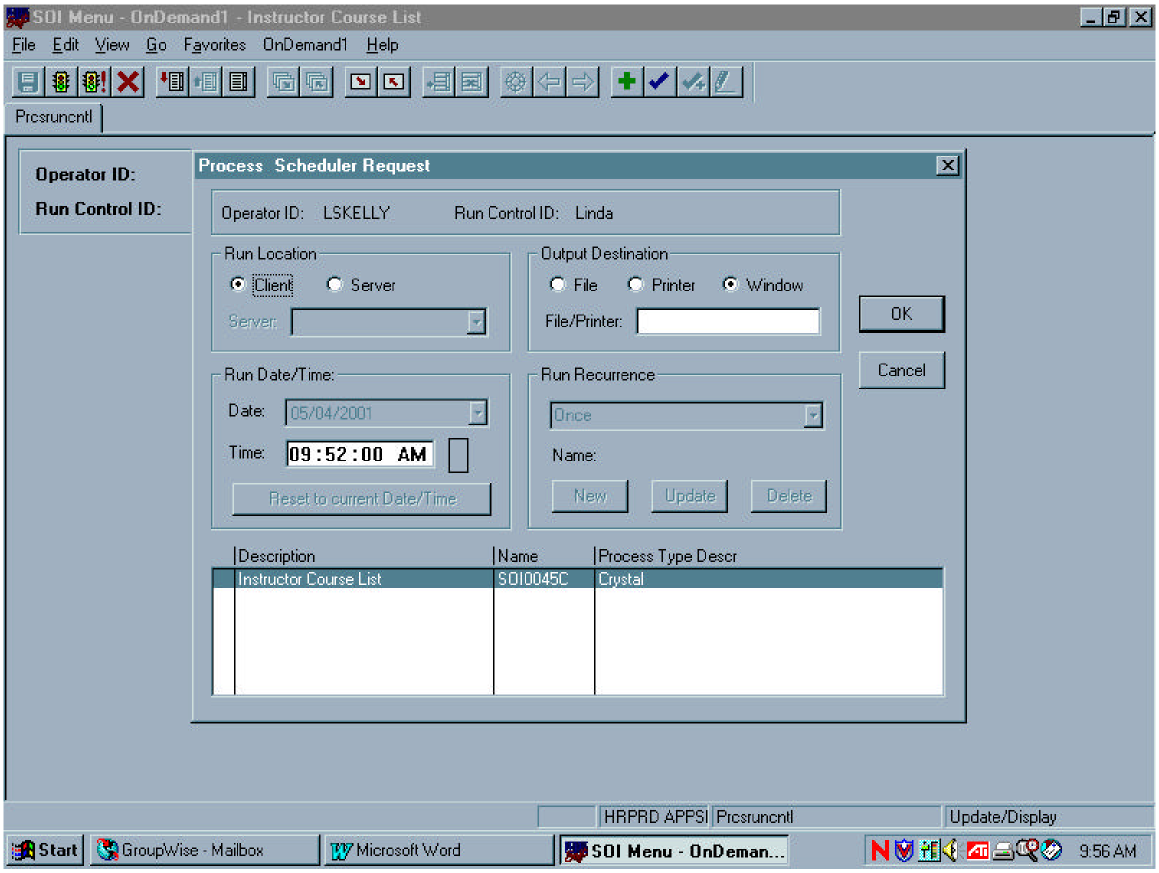


The above panel will appear.

Click the first Stop Light Icon to run report.

TRAINING REPORTS

Instructor Course List

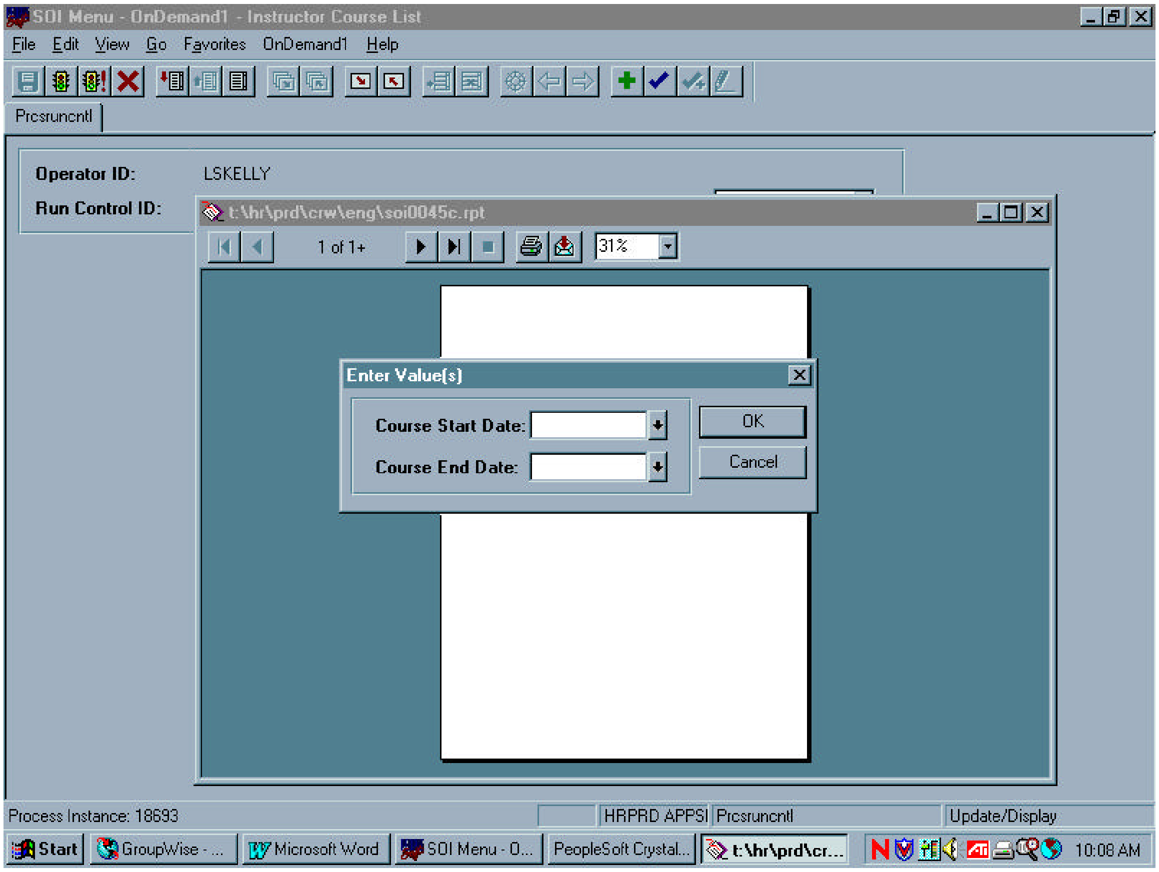


Upon running report, the above window will appear.

Click “OK”

TRAINING REPORTS

Instructor Course List



The above window will appear.

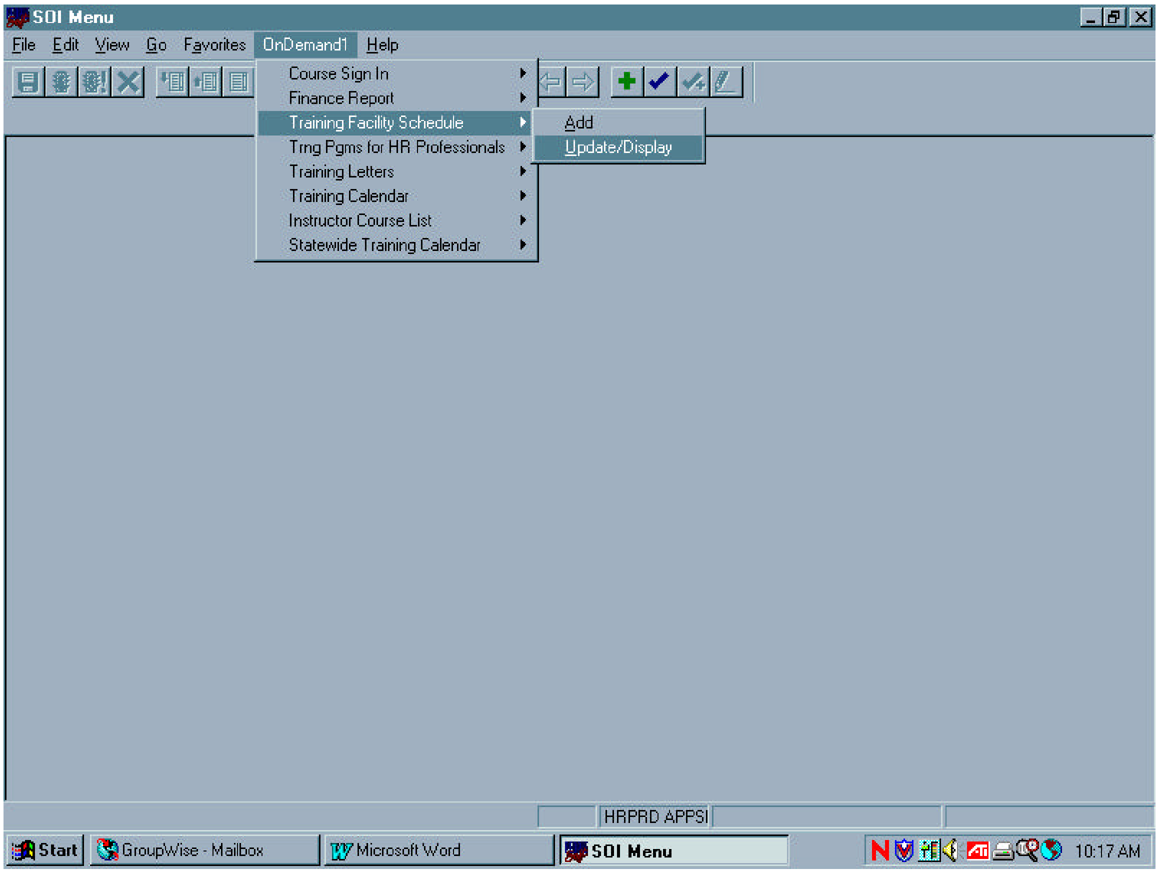
Enter the Beginning and Ending dates of the Course you wish to print.

Click “OK”. When the report appears, click the Print Icon at the top of the page.

TRAINING REPORTS

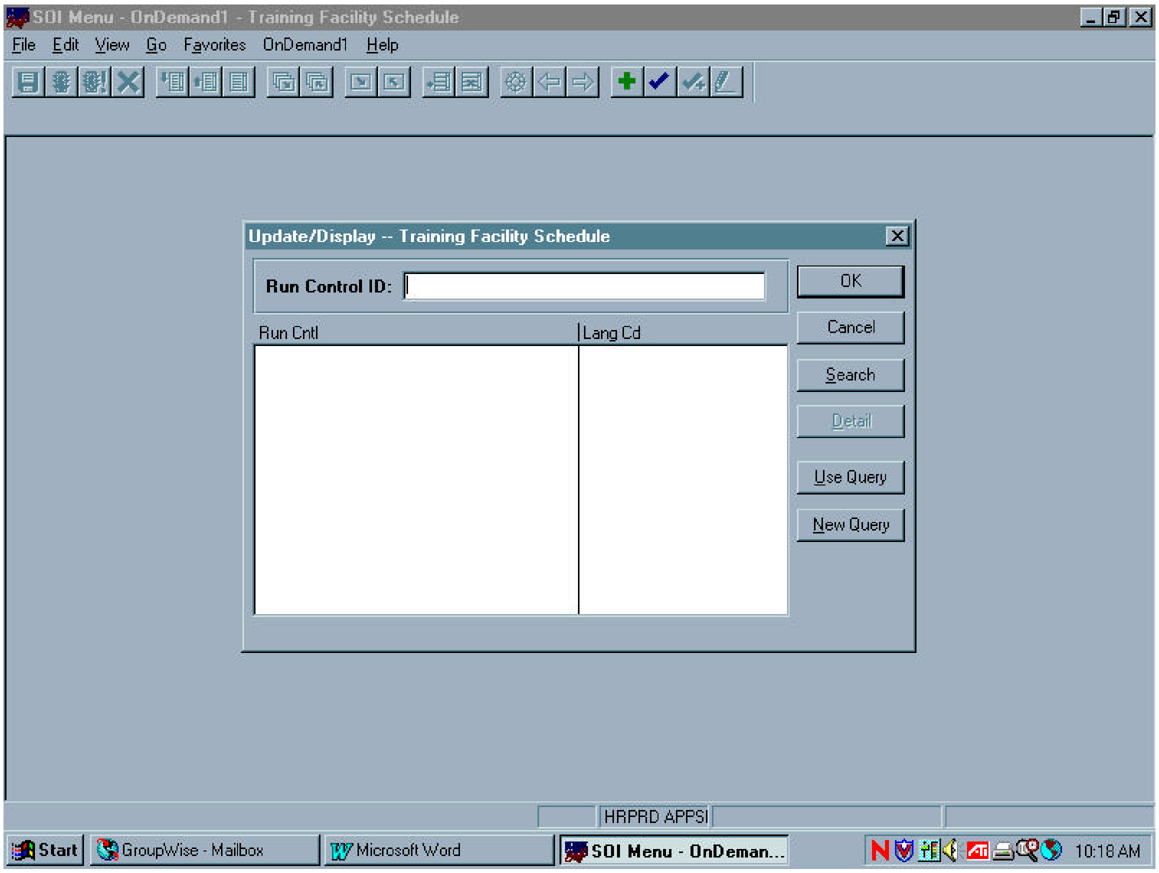
Training Facility Schedule

Navigate To The Training Facility Schedule: GO – SOIMENU – ONDEMAND1 – TRAINING FACILITY SCHEDULE – UPDATE/DISPLAY



TRAINING REPORT

Training Facility Schedule

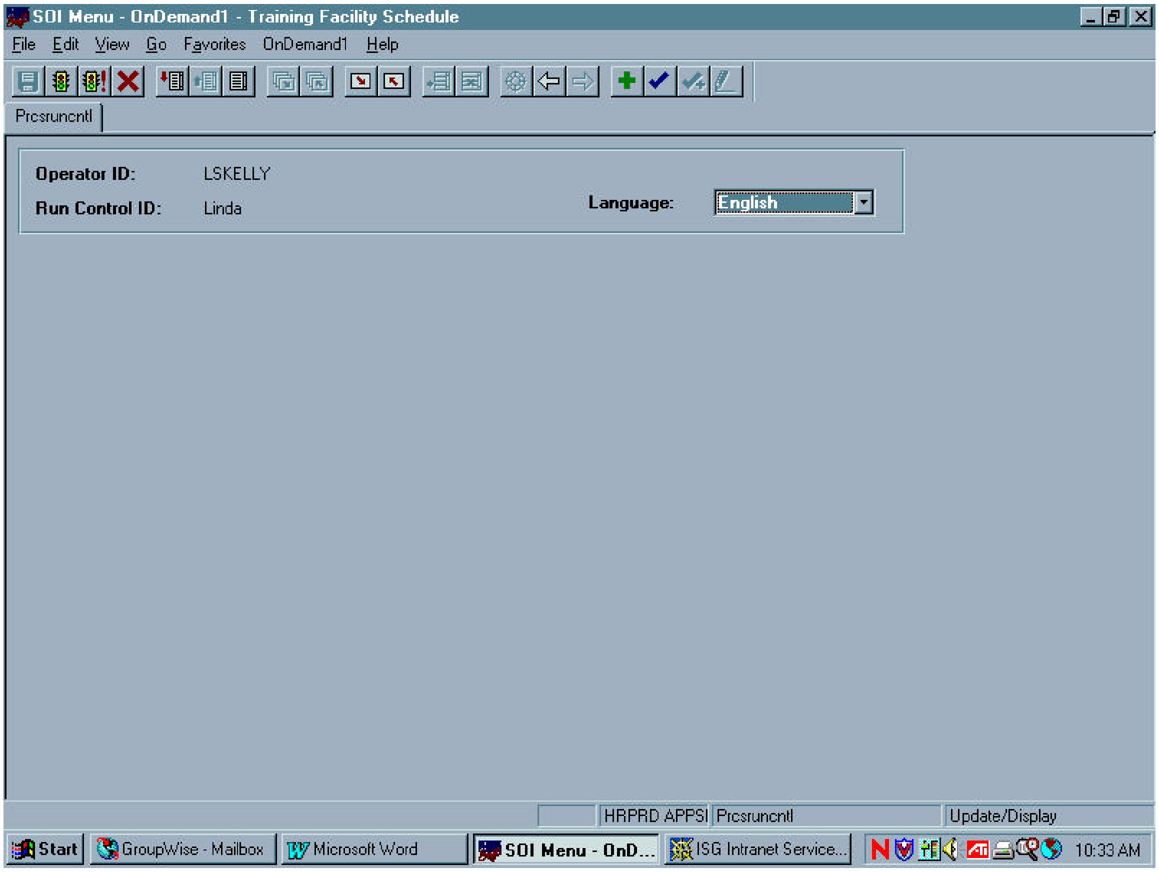


.

Click the "OK" button.

TRAINING REPORTS

Training Facility Schedule

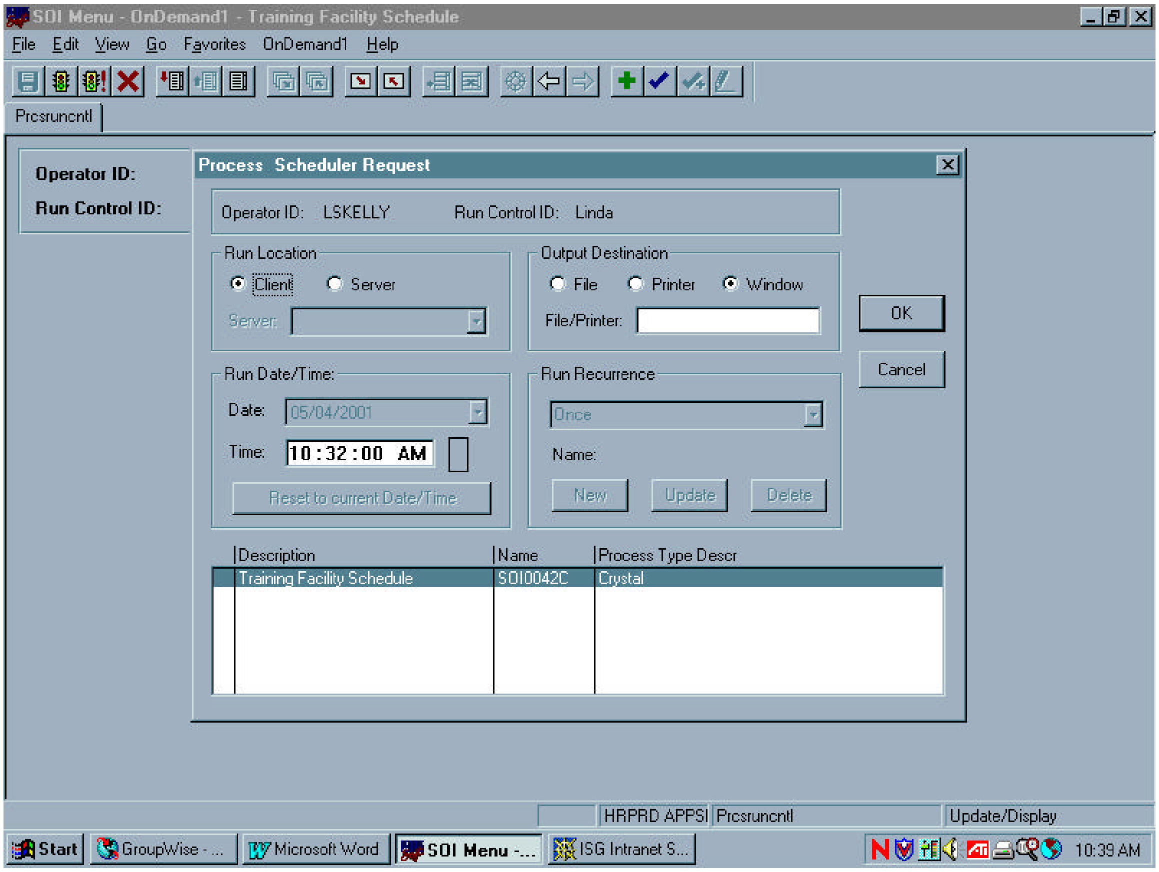


The above panel will appear.

Click the first Stop Light Icon to run report.

TRAINING REPORTS

Training Facility Schedule

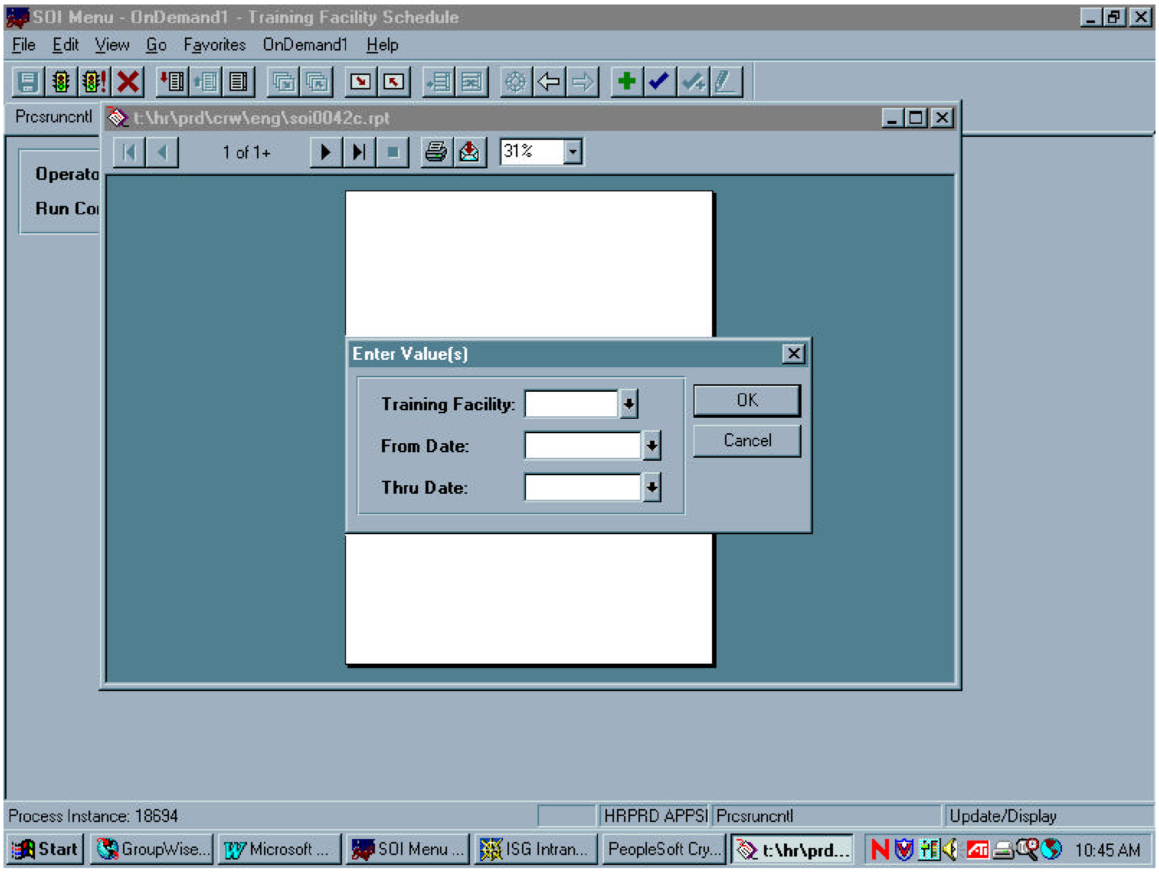


Upon Running Report, the above window will appear.

Click “OK”.

TRAINING REPORTS

Training Facility Schedule



The above window will appear.

Enter the Training Facility Code. If the Code is unknown, click the down arrow to the right, a list of all training facilities will appear. Scroll down until you find the Facility you wish to print, highlight it and click on it twice or you can click "OK". Enter the Beginning and Ending Dates for the report you wish to print. Click "OK".

Click on the Print Icon at the top of the window to print the report.

TRAINING DATA CHANGES

DATA CHANGES		
PATH	**PANELS**	**FIELDS**
	ESTABLISHING COURS SESSIONS	
Go - Develop Workforce - Administer Training US - Set-up-Course Session Table	Course Session Profile	Start/End date, Start/End time, Duration, Duration Unit, Min/Max Students, Vendor ID (Agency #)
	Location	At Facility- click the down arrow and select the proper facility for this course. Enter the room number.
	Equipment	Enter the 1st piece of equipment, insert a row, enter the next piece, etc.
	Instructor/Expense	Click on the Instructor ID arrow and select the proper instructor for this course and save.
	COURSE SESSION ENROLLMENT	
Go - Develop Workforce - Administer Training US - Use-Course Session Enrollment	Enter the Course Code- select course date by clicking twice on the title or by clicking OK.	Insert a row, enter EmplID or find the name, select status and enter training reason. Save or enter another person.
	STUDENT TRAINING RECORD	
Go – Develop Workforce – Administer Training US – Use - Student Training	Course Student Enrollment	View detailed information
Go – Develop Workforce – Administer Training US – Use - Inquiry	Student Training Summary	View brief information (will only see Completed &/or Enrolled Courses)
	PREPARING REPORTS	
Go – SOI Menu -OnDemand1	Select Sign-in, Instructor's Course, Training Calendar, etc. Update/Display	At the Run Control Window click OK, click on the 1st stoplight. Run to Window, click ok, enter desired information @ prompt & your Agency Vendor ID, if applicable.

PATH	PANELS	FIELDS
	CLOSING OUT CLASSES	
Go-Develop Workforce-Administer Training US-Use-Course Session Enrollment	Step 1-Work the Sign-in Sheet	Enter Course Code to be closed. Scroll down to find the names that need to be marked No Show. When finished Save your record.
Go-Develop Workforce-Administer Training US-Setup-Course Session Table-Course Session Profile-Update/Display	Step 2- Complete the Class	Click the drop down arrow at Session Status, select the value "Complete" and Save your record.
Go-Develop Workforce-Administer Training US-Use-Course Session Evaluations	Step 3- Rating Area & Ratings	In the Rating Area: Click the down arrow, select one of the five choices. In the Rating: Click the down arrow, select one of the four choices. Enter the total count in the box shown. Utilize insert row icon and continue with the remaining selections in each section. Save your record.